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If you have received this RFP electronically then you must notify the contact person listed in block 10 of the original SF 33 of the original RFP in writing or via facsimile. The Agency is not responsible for any data/text that may not be received when using an electronic form to obtain this document. If the recipient does not notify the contact person that they have obtained this document then any amendments to the document may not be received by the recipient and the recipient could risk being found unresponsive if an offer is made against this solicitation, of which any amendment would become part.

Issuing Date: July 28, 2000
Closing Date: September 28, 2000
Closing Time: 11:00 a.m. EDT

SUBJECT: REQUEST FOR PROPOSAL (RFP) NO. M/OP-00-1518
DEVELOPMENT INFORMATION SERVICES (DIS)

TO ALL INTERESTED PARTIES:

The U.S. Agency for International Development (USAID) is soliciting proposals from qualified organizations to provide the services detailed in the attached solicitation. The contract awarded will be a five-year, Level of Effort, Cost Plus Fixed Fee contract. We anticipate one contract to be awarded See Section M.1 (a) (1) for further information. The estimated level of effort is in Section B8. This RFP contains a list of parties receiving or properly requesting the document. It is the mission of the U.S. Agency for International Development's (USAID) Center for Development Information and Evaluation, Development Information and Outreach Division (CDIE/DIO) to acquire, preserve and promote knowledge of the Agency's performance and experiences in the planning, implementation, and evaluation of development programs and activities around the world, to provide research support to the development community, to promote the use of development information resources in lesser developed countries (LDCs) through its program responsibilities, and to strengthen USAID's programs through the use and analysis of internal and external information and data on development experience and social and economic conditions in developing countries.

The development community, which CDIE/DIO's programs are designed to reach, include USAID's field missions and their LDC counterparts; USAID/Washington decision-makers, technical specialists, researchers, development activity designers, evaluators, and implementers; USAID Contractors and grantees; USAID-funded private and voluntary organizations (PVOs); institutions and individuals in developing countries; international and national organizations and institutions active in development and development research; firms and businesses interested in private sector opportunities in developing countries; and the general public with interests in development.

Since 1982, this mission has been pursued in part through two contract mechanisms managed by CDIE's Development Information and Outreach Division and predecessor organizations:

*** Research and Reference Service (R&RS)**

A contract, which provides on-demand and proactive research, reference and analysis, services to access and disseminate USAID-generated, USAID-funded and selected non-USAID information to the development community. This audience is serviced through a central research and reference staff, the USAID Library, on-site USAID Bureau liaison research analysts, specialized information centers and through technical assistance activities.

*** Economic and Social Data Service (ESDS)**

A contract which provides a mechanism for selecting, acquiring, analyzing, providing access to and disseminating economic and social statistical country trends and performance indicator data for USAID-assisted countries around the world. The majority of the data, which is provided through this service, comes from other non-USAID sources, such as the World Bank, United Nations specialized agencies, U.S. Government agencies and other international development organizations.

The incumbent contractors are as follow:

Academy for Educational Development
1825 Connecticut Ave, NW
Washington, DC 20009

DevTech Systems
1629 K Street NW
Washington, DC 20006

If you decide to submit an offer, it must be submitted in accordance with the attached solicitation at the place and time indicated in Block 9 of the Cover Page (Standard Form 33). Note that Block 14 of SF 33 requires offerors to acknowledge all amendments to the solicitation. Those parties receiving the RFP from our website should watch for amendments, which will also be posted to the website when issued. This RFP is in Word 97 format.

To facilitate your response, we are enclosing a "certification package" which contains all sections of the solicitation, which require offeror fill-in. This should reduce the need for copying or pulling apart pages in order to complete all required information.

USAID encourages the participation to the maximum extent possible of U.S. small businesses, U.S. small disadvantaged businesses, U.S. women-owned small businesses, and U.S. HUBZone small businesses in this activity as prime or subcontractors in accordance with Part 19 of the FAR. In this respect, it is anticipated that the prime contractor will make every reasonable effort to identify and make maximum practicable use of such concerns. To help identify potential subcontractors, a list of all organizations requesting a copy of the solicitation will be included with each solicitation issued. By providing the list, USAID does not endorse the listed organizations as being capable of carrying out the activity, nor does USAID verify the claimed status of the organizations. Necessarily, the list will contain the names of only those organizations known prior to the issuance of the solicitation. Telephone requests for the RFP will not be honored. The preferred method of distribution of USAID procurement information is via the Internet or by request of a solicitation on a 3.5" Floppy Disk.

For organizations other than small businesses, **the RFP contains a required subcontracting goal of 15% to be allocated among small businesses, small disadvantaged businesses, and women-owned small businesses**; see sections H.7 and M.4 for specific details. To broaden the number of participants in the Center for Development Information and Evaluation, Development Experience the Bureau for Policy and Program Coordination heavily encourages use of subcontractors in performance of the work.

The RFP also contains a requirement for small disadvantaged business (SDB) participation targets. While this new requirement is distinct from the aforementioned 15% subcontracting goal, offerors who are required to submit subcontracting plans may use, if they wish, the same amount or percentage for the SDB component of the subcontracting plan as for the SDB participation target.

The SDB target requirement became effective on January 1, 1999, and applies to small business organizations as well as other than small businesses. See Section H.9, Section M.2, paragraph (b), FAR Provision 52.219-24, and FAR Clause 52.219-25 (the latter is incorporated by reference). The Standard Industry Classification (SIC) for this RFP is 7379, and the small business size standard is \$18 million dollars in annual receipts. USAID encourages the participation to the maximum extent possible of U.S. Disadvantaged Enterprise Program entities and small business concerns.

Please see Section M.3 regarding offer relative capability. FAR Clause 52.215-1, appearing in Section L.2, indicates that we intend to evaluate proposals and award contracts without discussions with offerors; thus, your initial proposal should contain your best terms from a price and non-price standpoint.

Upon receipt of this solicitation, offerors should carefully review the entire document. Questions that may arise during your review of this document should be addressed in writing to the attention of Bettie F. Bowles, Contract Specialist, USAID, M/OP/B/AEP, RRB 7.09-075, Washington, DC 20523-7100. Questions may also be e-mailed to bbowles@uasid.gov. All questions relating to this document must be submitted no later than 30 calendar days prior to the closing date to allow for a written response. Other than request for full text versions of clauses (see following paragraph), we generally will not respond to questions individually; rather we will publish questions and their answers in an amendment. USAID will not acknowledge RFP questions submitted orally. The procedure is necessary for recording purposes.

If you require a copy of the solicitation in paper form, you must specifically ask for it, but you will not receive both a copy in paper form and a floppy disk. This CBD notice can be viewed and downloaded using the Agency Web Site. The RFP, once issued, can be downloaded from the Agency Web Site. The Worldwide Web address is <http://www.usaid.gov>. Select Business and Procurement Opportunities from the Home Page, then "USAID Procurements". On the following screen, select "Download available USAID Solicitations" and find the number of this solicitation. Receipt of this RFP through the Internet must be confirmed by written notification to the contact person noted above if you wish to be notified of any amendments to the solicitation. It is the responsibility of the recipient of this solicitation document to ensure that it has been received from the internet in its entirety and USAID bears no responsibility for data errors resulting from transmission or conversion processes. USAID is not obligated to award a contract.

This RFP incorporated numerous FAR and AIDAR clauses by reference. Full text versions of referenced clauses are available upon request and at websites noted in the incorporated-by reference clause in the RFP.

ADDRESS FOR ALL OFFERORS:

BY HAND

Agency for International Development
Office of Procurement
M/OP/B/AEP, Room 7.09-112
Ronald Reagan Building
1300 Pennsylvania Avenue
Washington, D.C. 20523

BY MAIL

Agency for International Development
Office of Procurement
Ronald Reagan Building
1300 Pennsylvania Avenue
M/OP/B/AEP, Room 7.09-112
Washington, D.C. 20523
Attn: RFP No. M/OP-00-1518

Enter at the 14th Street Lobby Only
USAID Visitor's Desk
Attn: Bettie F. Bowles
Attn: RFP No. M/OP-00-1518
Contact: Bettie F. Bowles (202-712-0595)

[Note 1: The "By Hand" address is for courier services such as FedEx, UPS, DHL, etc. Couriers must stop by the Visitor's desk located in the Ronald Reagan Building (RRB) lobby on the 14th Street entrance and contact Ms. Bettie F. Bowles at 202-712-0595. If Ms. Bowles is not available, offerors are advised to contact Ms. Angela Fortune at 202-712-5188. Visitor Desk personnel will provide additional points of contact upon request.]

[Note 2: Offerors are further advised that the Visitor's Desk cannot accept proposals/packages and, therefore, couriers for offerors must ensure that proposals are delivered directly to either Ms. Bowles or Ms. Fortune. As a result, if an offeror intends to submit a proposal prior to the closing date of this solicitation, the offeror should contact Ms. Bowles (prior to sending a courier to deliver the package to USAID) to ensure that she will be available to pickup the proposal. Offerors are solely responsible for ensuring timely delivery to USAID.]

All offerors must be received by Bettie F. Bowles or Angela Fortune by the closing time in block 9 of the SF-33 (11:00 am on September 28, 2000). Offerors should retain for their record copies of all enclosures, which accompany their offers.

Sincerely,

Michael B. Gushue
Contracting Officer
M/OP/B/AEP

SOLICITATION, OFFER AND AWARD				1. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)		RATING		PAGE OF PAGES 1 156	
2. CONTRACT (Proc. Inst. Ident.) NO.		3. SOLICITATION NO. M/OP-00-1518		4. TYPE OF SOLICITATION [] SEALED BID (IFB) [X] NEGOTIATED (RFP)		5. DATE ISSUED July 28, 2000		6. REQUISITION/PURCHASE NO. 10056/391	
7. ISSUED BY US Agency for International Development M/OP/B/AEP, RRB Room. 7.09-112 Washington, D.C. 20523-7100 Attn: RFP M/OP-00-1518				CODE M/OP/B/AEP		8. ADDRESS OFFER TO (If other than item 7) US Agency for International Development M/OP/B/AEP, RRB Room. 7.09-112 Washington, D.C. 20523-7100 Attn: RFP M/OP-00-1518			
NOTE: In sealed bid solicitation "offer" and "offeror mean "bid" and "Bidder".									
<i>SOLICITATION</i>									
9. Sealed offers in original and <u>4</u> copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if handcarried, in the depository located in Block 7 until 11:00 a.m. Local time September 28, 2000.									
(hour) (date)									
CAUTION - LATE Submissions, Modifications, and Withdrawals: See Section L. Provision No. 52.214-7 or 52.215-1. All offers are subject to all terms and conditions contained in this solicitation.									
10. FOR INFORMATION CALL:		A. NAME Bettie F. Bowles or Michael Gushue				B. TELEPHONE NO. (Include Area Code) (NO COLLECT CALLS) (202) 712-0595 / (202) 712-5831 E-Mail: bbowles@usaid.gov / mgushue@usaid.gov			
11. TABLE OF CONTENTS									
(x)	SEC.	DESCRIPTION	PAGE (S)	(x)	SEC.	DESCRIPTION	PAGE (S)		
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OFFER (Must be fully completed by offeror)									
NOTE: ITEM 12 does not apply if the solicitation includes the provisions at 52.214-16, Minimum Bid Acceptance Period.									
12. In compliance with the above, the undersigned agrees, if this offer is accepted within _____ calendar days (60 calendar days unless a different period is inserted by the offer) from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified in the schedule. **** See Section L.4 (a)									
13. DISCOUNT FOR PROMPT PAYMENT SEE (See section I, Clause No 52.232-8)		10 CALENDAR DAYS %		20 CALENDAR DAYS %		30 CALENDAR DAYS %		CALENDAR DAYS %	
14. ACKNOWLEDGMENT OF AMENDMENTS (The offeror acknowledges receipt of amendments to the solicitation for offerors and related documents numbered and dated):		AMENDMENT NO.		DATE		AMENDMENT NO.		DATE	
15A. NAME AND ADDRESS OF OFFEROR		CODE		FACILITY		16. NAME AND TITLE OF PERSON AUTHORIZED TO SIGN OFFER (Type or print)			
15B. TELEPHONE NO. (Include area code)		15C. CHECK IF REMITTANCE ADDRESS [] IS DIFFERENT FROM ABOVE - ENTER SUCH ADDRESS IN SCHEDULE			17. SIGNATURE			18. OFFER DATE	
AWARD (To be completed by Government)									
19. ACCEPTED AS TO ITEM NUMBERED		20. AMOUNT		21. ACCOUNTING AND APPROPRIATION					
22. AUTHORITY FOR USING OTHER THAN FULL AND OPEN COMPETITION: [] 10 U.S.C. 2304@ () [] 41 U.S.C. 253@ ()				23. SUBMIT INVOICES TO ADDRESS SHOWN IN (4 copies unless otherwise specified)				ITEM:	
24. ADMINISTRATION BY (If other than Item 7) CODE				25. PAYMENT WILL BE MADE BY CODE					
26. NAME OF CONTRACTING OFFICER (Type or print)				27. UNITED STATES OF AMERICA 28. (Signature of Contracting Officer)				28. AWARD DATE	

IMPORTANT - Award will be made on this form, or on the Standard Form 26, or by other authorized official written notice.

NSN 7540-01-152-8064

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PART I - THE SCHEDULE

SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS**B.1 PURPOSE**

The purpose of this contract is to provide U.S. Agency for International Development's (USAID) Center for Development Information and Evaluation, Development Information and Outreach Division (CDIE/DIO) services to preserve and promote knowledge of the Agency's performance and experiences in the planning, implementation, and evaluation of development programs. Provide research support to the development community and to promote the use of development information resources in lesser-developed countries (LDCs) through its program responsibilities. Also, strengthen USAID's programs through the use and analysis of internal and external information and data on development experience and social and economic conditions in developing countries.

[End of Clause]

B.2 CONTRACT TYPE

This is a Cost-Plus-Fixed-Fee (CPFF) term contract. For the consideration set forth below, the Contractor shall provide the deliverables or outputs described in Section F in accordance with the performance standards specified in Section E.

[End of Clause]

B.3 ESTIMATED COST, FIXED FEE, AND OBLIGATED AMOUNT

(a) YEAR 1 _____ TO _____

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(b) YEAR 2 _____ TO _____

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(C) YEAR 3 _____ TO _____

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(d) YEAR 3 _____ TO _____

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(e) YEAR 4 _____ TO _____

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

[End of Clause]

B.4 OPTIONAL TASK ESTIMATED COST, FIXED FEE, AND OBLIGATED AMOUNT

(a) Section C.9.1 Additional Core DIS Services Option

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(b) Section C.9.2 Africa Global Information Infra. Project – Leland Initiative

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(c) Section C.9.3 PPC/PC RESEARCH ANALYST SUPPORT

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(d) C.9.4. PPC/PDC RESEARCH ANALYST SUPPORT OPTION

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

(e) C.9.5. LAC HURRICANE RECONSTRUCTION INFORMATION COORDINATOR OPTION

The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$_____. The fixed fee, if any, is \$_____. The estimated cost plus fixed fee, if any, is \$_____. Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is _____. The Contractor shall not exceed the aforesaid obligated amount.

B.5 CURRENTLY OBLIGATED AND AVAILABLE

Within the estimated cost plus fixed fee (if any) specified in paragraph (B.3.a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$_____. The Contractor shall not exceed the aforesaid obligated amount.

[End of Clause]

B.6 FUNDING PERIOD

Funds obligated hereunder are anticipated to be sufficient through _____.

B.7 BUDGET LABOR MATRIX

Development Information Service - Cost by section is in attachment number nine (9) and/or excel file: RFP COST.XLS. (**Contractor fill-in**)

B.8 ESTIMATED LEVEL OF EFFORT

Development Information Service estimated level of effort for each year is in attachment number nine (9) and/or excel file: RFP COST.XLS. (**Contractor fill-in**)

B.9 BUDGET ASSUMPTIONS

The budget assumptions are in section L.4 (C).

B.10 INDIRECT COSTS (DEC 1997)

Pending establishment of revised provisional or final indirect cost rates, allowable indirect costs shall be reimbursed on the basis of the following negotiated provisional or predetermined rates and the appropriate bases:

Description	Rate	Base	Type	Period
-------------	------	------	------	--------

[TO BE DETERMINED]

[End of Clause]

B.11 CEILING ON INDIRECT COST RATES (DEC 1997)

(1) Reimbursement for indirect costs shall be at the lower of the negotiated final (or predetermined) rates or the following ceiling rates:

Description	Rate	Base	Period
-------------	------	------	--------

[TO BE DETERMINED]

(2) The Government will not be obligated to pay any additional amount should the final indirect cost rates exceed the negotiated ceiling rates. If the final indirect cost rates are less than the negotiated ceiling rates, the negotiated rates will be reduced to conform with the lower rates.

(3) This understanding shall not change any monetary ceiling, obligation, or specific cost allowance or disallowance. Any change in classifying or allocating indirect costs requires the prior written approval of the Grant/Agreement/Contracting Officer.

[End of Clause]

B.12 COST REIMBURSABLE

The U.S. dollar costs allowable shall be limited to reasonable, allocable and necessary costs determined in accordance with FAR 52.216-7, Allowable Cost and Payment, FAR 52.216-8, Fixed Fee, if applicable, and AIDAR 752.7003, Documentation for Payment.

[End of Clause]

SECTION C STATEMENT OF WORK**DEVELOPMENT INFORMATION SERVICES****BACKGROUND****OVERVIEW OF DEVELOPMENT INFORMATION PROGRAM**

It is the mission of the U.S. Agency for International Development's (USAID) Center for Development Information and Evaluation, Development Information and Outreach Division (CDIE/DIO) to acquire, preserve and promote knowledge of the Agency's performance and experiences in the planning, implementation, and evaluation of development programs and activities around the world, to provide research support to the development community, to promote the use of development information resources in lesser developed countries (LDCs) through its program responsibilities, and to strengthen USAID's programs through the use and analysis of internal and external knowledge, information and data on development experience and social and economic conditions in developing countries.

The development community, which CDIE/DIO's programs are designed to reach, include USAID's field missions and their LDC counterparts; USAID/Washington decision-makers, technical specialists, researchers, development activity designers, evaluators, and implementers; USAID Contractors and grantees; USAID-funded private and voluntary organizations (PVOs); institutions and individuals in developing countries; international and national organizations and institutions active in development and development research; firms and businesses interested in private sector opportunities in developing countries; and the general public with interests in development.

Since 1982, this mission has been pursued through three contract mechanisms managed by CDIE's Development Information and Outreach Division and predecessor organizations:

* **Research and Reference Service (R&RS)**

A contract, which provides on-demand and proactive research, reference and analysis services to access and disseminate USAID-generated, USAID-funded and selected non-USAID information to the development community. This audience is serviced through a central research and reference staff, the USAID Library, on-site USAID Bureau liaison research analysts, specialized information centers and through communications, outreach, training and technical assistance activities.

* **Economic and Social Data Service (ESDS)**

A contract which provides a mechanism for selecting, acquiring, analyzing, providing access to and disseminating economic and social statistical country trends and performance indicator data for USAID-assisted countries around the world. The majority of the data, which is provided through this service, comes from other non-USAID sources, such as the World Bank, United Nations specialized agencies, U.S. Government agencies and other international development organizations.

* **Development Experience Clearinghouse (DEC)**

A contract which provides access to a large body of worldwide, USAID-produced and USAID-funded, development literature and experiential information, as well as on-demand delivery, for these documents and reports through the Development Experience System (DEXS), USAID's institutional memory system.

CURRENT INTER-RELATIONSHIP AND SUPPORTING ROLES OF CDIE/DIO CONTRACTS AND OTHER AGENCY OFFICES

These three contracts currently interact with and complement each other in pursuing CDIE/DIO's mission statement.

DEC Contract Support to ESDS: The DEC contract provides responses to on-demand orders and information dissemination services are provided for ESDS-produced publications. The DEC also provides the following logistical support to half of the ESDS contract staff (six people) located in Rosslyn: office space; furniture; telephone equipment and support (including voice and data lines); local area network server, connectivity, administrative support and services (including email and Internet connectivity); and reproduction equipment and services.

DEC Contract Support to R&RS: The R&RS contract relies on the DEC contract for acquisition, access and delivery of the USAID-funded and -produced development experience information and reports. The DEC updates and maintains the Development Experience System (DEXS) so that the R&RS staff can research, retrieve, analyze and disseminate USAID development experience to the development community they serve. The DEC also provides training support for accessing the DEXS, produces an annual CD-ROM product, CD-DEXS, and designs and maintains the CDIE OnLine home page, of which both contain the DEXS databases and full-text of selected USAID publications and reports in electronic form. The CD-ROM and CDIE OnLine home page products are made available to the USAID Library, along with microfiche or electronic copies of all USAID reports processed by the DEC, for public access and retrieval of USAID development experience by Library patrons. The DEC also provides mailing list, printing and dissemination services for R&RS contract publications.

R&RS Contract Support to DEC: The R&RS contract is responsible for identifying appropriate USAID development experience documents, reports, studies and publications for acquisition and processing by the DEC contractor into the DEXS. R&RS refers all requests for specific USAID documents and DEC information publications, e.g. CD-DEXS, to the DEC document distribution unit.

R&RS Contract Support to ESDS: R&RS refers all requests for economic and social statistical data and analysis to ESDS for processing and response. Joint requests for statistical, development experience information shall be closely coordinated between R&RS, and ESDS contract staff. The USAID Library provides ESDS staff with inter-library loan services and access to its collection of economic development journals, literature, and references as part of its normal collection development program for Agency staff. The R&RS newsletter "Requests and Responses", which is sent to all Agency professional program, management and technical staff in Washington and overseas, periodically features ESDS service requests, resources and services available to USAID staff.

ESDS Contract Support to R&RS: The ESDS contract works collaboratively with the R&RS staff to respond to on-demand requests and in the preparation of proactive information and analytical products where social and economic data, statistical analysis, presentation graphics, econometric modeling, etc. are required to complete the information package. ESDS and R&RS coordinate all statistical data and reference acquisitions with the USAID Library to insure a coordinated CDIE/DIO acquisitions program. ESDS also provides statistical data and analysis support to the specialized information centers managed by R&RS including the Africa Bureau Information Center (ABIC).

Information Resource Management (M/IRM) Support: The IRM office provides computer operator and technical support staff, computer and communications hardware and software necessary to operate and maintain the computer systems for the Development Experience System (DEXS) databases, electronic, full-text and scanned-image documents and reports, the CDIE OnLine home page, various USAID Bureau websites, the Economic and Social Data Base (ESDB) databases and the USAID Library Integrated OnLine Library System (IOLS). IRM provides the DEC, ESDS and R&RS contractors with on-line access to these computer systems to permit the contractors to administer, update and maintain all records, files and documentation associated with the DEXS databases, full-text and image documents and reports, library system (IOLS) catalog databases, ESDB databases and CDIE OnLine website pages. This IRM support is currently provided from on-site, Agency office space, occupied and managed by IRM. CDIE contractors provide their own communications links to the IRM-provided computer systems. The CDIE contractors also provide their own technical or computer support services required for designing, operating or maintaining hardware, software and computer systems located at the current contractor-leased facilities located in off-site (non-Agency) office space in the Washington, D.C. area.

SCOPE OF WORK DEVELOPMENT INFORMATION SERVICES (DIS)

This scope of work merges the scopes of work for two of the three current CDIE/DIO contracts, Research and Reference Services [R&RS], Economic, and Social Data Services [ESDS] into one Development Information Services (DIS) contract scope. The current contracts, which have different contract completion dates, will have their portions of the new DIS contract scope phased in over a three-month period. The R&RS contract will be initially phased into the new DIS contract beginning March 2001. The ESDS contract will be phased into the new DIS contract beginning May 2001. The DEC contract will continue to provide the same support to the new combined DIS contract with one exception. Office space and facility support provided to the current ESDS contract staff in Rosslyn (six people) by the DEC contract will be provided under the new DIS contract.

The DIS contract shall be managed by a full-time **Project Director** who is a senior executive, development professional with 10-15 years experience in planning, managing, marketing and evaluating development assistance programs. The DIS contract scope shall be implemented through three contract teams: Knowledge Resources Team, Knowledge Services Team and the Knowledge Sharing Team.

C.1. KNOWLEDGE RESOURCES TEAM (PERFORMANCE BASE)

The contractor shall provide a DIS Knowledge Resources (KR) Team that shall acquire, maintain, provide access to and disseminate USAID and non-USAID development information and knowledge resources used by the DIS Knowledge Services Team for proactive and on-demand research, reference and analysis services to USAID staff, development partners and development practitioners. The Senior USAID Library Manager shall serve as the Knowledge Resources Team Leader coordinating overall USAID Library and Learning Resources Center operations and knowledge resources activities by the DIS contract including Development Statistics Service data acquisition strategy with USAID Library collection development policy.

C.1.1. USAID LIBRARY RESOURCES

The Contractor shall operate and maintain the USAID Library with six core staff librarians, including a Senior Library Manager, Mid-level Collection Development Librarian, Mid-level Online Services Librarian, Mid-level Cataloging/Reference Librarian, Inter-Library Loan Library Technician and a Reference Librarian Technician. The Library shall be the Agency's central development information resources center which provides a place for USAID staff and partners to access, share and conduct intellectual research on the Agency's current development themes in sustainable development. The Agency shall provide USAID office space in the Information Center on the Mezzanine Level of the Ronald Reagan Building for the USAID Library operation, the six USAID Library staff and five core Development Research Service analysts (see section C.2.1). The Library shall also serve as an Agency forum to stimulate the exchange of views on development concepts and issues.

In operating the USAID Library, the contractor shall:

- (1) Acquire, maintain, weed and develop the hardcopy, electronic and microfiche document resources collection of USAID and non-USAID development materials within USAID's current strategic program areas. (Approximately 1,500 non-USAID development-related materials acquired per year including CDROMs, online databases, commercial publications and references [500], serial publications [250], interlibrary loan purchases [500], gift development materials [150] and other development organization publications [100]).
- (2) Similarly acquire, maintain, weed and develop the USAID and non-USAID serials collection resources.

- (3) Acquire, maintain and develop appropriate reference collection resources.
- (4) Operate and maintain the USAID Library Integrated Online Library System (IOLS), (SIRSI the UnicornSTILAS Collection Management System), and use it to support acquisitions, cataloging, circulation, serials control, and online public access catalog (OPAC) library functions. Pay for annual SIRSI software maintenance agreements costs.
- (5) Perform library loan (3,000 items per year), circulation (1,500 items per year), and serials control functions for a collection of approximately 2,500 USAID historical and non-USAID hardcopy references, 10,000 circulating hardcopy monographs, documents and reports, 125,000 microfiche, and 400 serial publications.
- (6) Make recommendations to the CDIE/DIO USAID Library Manager for specific reports, serials, publications, databases, CDROMs, networks, audiovisuals, library tools and other library services that shall enhance the quality of the USAID Library resources and services.
- (7) Acquire non-USAID development materials (including reference materials, monographs, periodicals, audiovisuals, electronic media, journals, and other donor and development organization documents) for addition to the library collection. This responsibility includes all tasks including, but not limited to, identifying relevant material, duplicate checking, document ordering and purchase, subscriptions to periodicals, document tracking and claiming, invoice payment, accounting and management reporting. All purchases must be approved by CDIE/DIO Library Manager.
- (8) Fully catalog, index and selectively annotate about 750 non-USAID commercial development materials each year on the USAID Library Integrated Online Library System.
- (9) Provide library service and reference functions in response to walk-in, email, fax, Internet and telephone information requests. This shall include approximately 7,000 quick information requests requiring less than 30 minutes. These requests shall be generated from USAID staff and development partners, development organizations and the general public.
- (10) Perform online commercial database searches on services such as Online Computer Library Center (OCLC), Dialog, Lexis-Nexis, Dun&Bradstreet Credit Service and other database resource subscriptions provided by PPC/CDIE/DIO through inter-agency agreement.
- (11) Track and report library walk-in, reference, inter-library loan and other service statistics through the DIS contract central management information system.
- (12) Coordinate and obtain approval for all library policy, operation and procedural changes with the CDIE/DIO Library Manager.
- (13) Develop, maintain, and update a CDIE/DIO research, reference and library services manual following guidelines and procedures established by CDIE/DIO.
- (14) Coordinate the USAID Library operation with the DEC document distribution unit function, as closely as possible, to establish a seamless information service for USAID and non-USAID development materials requested by DIS users.

- (15) Develop, coordinate and implement CDIE/DIO workshops, seminars, "brown-bag" meetings and training sessions on CDIE/DIO programs, products and services, in addition to, development topics of priority interest to USAID staff. Sessions on CDIE/DIO's information program shall be conducted at the USAID Library and through participation in USAID training courses, such as the new employee orientation program, NEP program, and the Managing for Results and Internet Training for Development Practitioners courses.
- (16) Perform informal briefings of the USAID Library operation, collection and services for library patrons, USAID staff, development partners and management. Provide daily bibliographic instructions for library patrons on the use of the IOLS, CDIE OnLine, DEXS, commercial online databases such as OCLC First Search, Columbia International Affairs Online (CIAO) and various CD-ROM products, such as the CD-DEXS and ADS CDROMs.
- (17) Troubleshoot and coordinate the repair of library equipment, e.g. microfiche reader-printers, and computer equipment located in the USAID Library.
- (18) Collaborate closely with the Learning Resources Center librarian (section C.1.2) on appropriate joint activities such as collection development, cataloging, serials control, interlibrary loan, briefings, brown bags, open houses, walking tours, etc.

The contractor shall recommend refinements in existing research, reference and library operating procedures whenever such refinements are justified by operational experience. Any changes in existing procedures for which the contractor is directly responsible shall be documented by the contractor on a continuing basis and made available to the CDIE/DIO CTO.

C.1.2. OFFICE OF HUMAN RESOURCES (M/HR) - LEARNING SUPPORT DIVISION - LEARNING RESOURCES CENTER

The Senior-level librarian provided by the contractor shall operate and maintain the USAID Learning Resources Center Library (LRC). The LRC is an Agency-wide resource designed to provide people with the resources needed to learn to perform their jobs better. The librarian will be expected to expand the current multimedia section into an independent multimedia study center providing books, periodicals, audiovisuals, software and CD-ROM tutorials in support of the Agency's Learning Support Center programs and self-development.

The Librarian shall provide information research leadership to USAID staff who work in widely divergent fields such as agriculture, economics, education, health, the environment, and management. The Librarian should be technically knowledgeable in these several fields to be able to meet the information and research needs. Under the technical direction of direct hire staff, the contractor manages the geographic area studies program. One very important part of this responsibility includes preparing detailed country-specific information packages for employees assigned overseas.

The Librarian/Contractor must be knowledgeable and have the appropriate skills to work with the Learning Support Division's management team in support of the Learning Support Division's goal to transform USAID into an organization dedicated to learning or a "Learning Organization". The contractor shall have knowledge and experience in designing, planning and procuring the necessary state-of-the-art technical, audiovisual, computer hardware and software, books, periodicals and reference materials which directly support an organization committed to delivering just-in-time information and training worldwide through a wide variety of medium and supporting methodologies. Incumbent should be knowledgeable about Distance Learning, and Learning Organizations theories and associated methodologies and materials and support required for these as they relate to the LRC.

Major Duties and Responsibilities include:

- (1) Through technical guidance provided by the M/HR/LS Branch Chief plans and manages the budget to acquire materials for the LRC and equipment for the Learning Support Division's programs.
- (2) Selects, acquires, classifies, catalogues, and circulates materials for the LRC to respond to a wide variety of requests for information from USAID, PASA and contract personnel.
- (3) Interprets and responds to requests for information received in person, by telephone, via e-mail, Internet or in writing. In developing responses, independently employs any or all of the following professional skills: formulates appropriate search strategy; determines relevant information sources from the wide variety of media available in the Library and the expertise available in the Agency; conducts the search utilizing manual and or automated bibliographic reference tools; refers to knowledgeable experts in the Agency.
- (4) Responds to inquiries by providing, where appropriate, written technical abstracts highlighting the resources considered and found relevant, citations and or data of special significance, or conversely, the lack of materials, referring as appropriate to other or additional sources of information.
- (5) Recommends services the LRC should provide based on user needs analysis and services available in the D.C. area. Implements and recommends policies and procedures based on these analyses.
- (6) Alerts AID personnel to the information resources and services relevant to and available for carrying out Agency activities and directives.
 - a. Prepares and delivers presentations to various AID training groups, e.g., the New Entry Training course. Prepares handouts listing information sources and relevant materials.
 - b. Prepares appropriate announcements describing resources and services to keep USAID staff current about information relevant to U.S. development assistance and to programs managed by the Learning Support Division.
- (7) Maintains the LRC collection, keeps it up to date, and provides for user access to materials.
- (8) Manages the planning, design, updating, and use of the country-specific self-study materials. Through technical guidance provided by the M/HR/LS Branch Chief, trains, and reviews the work for up to four research assistants responsible for the updating of country information packets.
- (9) Selects and acquires country background materials that are made available to all USAID staff prior to overseas assignment, TDYs, etc.
- (10) Through technical guidance provided by the M/HR/LS Branch Chief and in conjunction with a direct hire staff registers and provides reporting instructions to staff attending the National Foreign Affairs Training Center's Area Studies Program.

- (11) Manages and expands the LRC multimedia resource center. Selects catalogs, classifies and abstracts videotapes, audiotapes, software tutorials, CD-ROMs, etc., and enters information into an automated database. Makes recommendations on the selection and acquisition of specific tools, reports, serials, databases, CD-ROMS, networks, audiovisuals and other services that shall enhance the quality of the services and resources provided by the LRC. Assists employees undergoing training by selecting appropriate tapes for their review. Instructs users in proper operation of equipment including CD ROMS, videos, etc.

The LRC Librarian shall work in USAID-provided space and operate the M/HR Learning Resource Center located in the Ronald Reagan Building. M/HR/LSD shall fund actual purchases for LRC materials through direct USAID purchase arrangements. M/HR/LSD shall provide up to four research assistants to assist LRC Librarian with country information packet development through a separate institutional agreement. The contractor shall provide necessary reproduction services for LRC country information materials. The LRC Librarian works in collaboration with the USAID Library staff to coordinate appropriate joint LRC-USAID Library functions.

C.2. KNOWLEDGE SERVICES TEAM

The Contractor shall provide an integrated central library, research and development statistics service to USAID staff, development partners and practitioners. Bureau- and Sector-based teams combining research analysts and social/economic data analysts shall be established to coordinate and manage proactive and on-demand work performed for DIS customers. These Bureau- and Sector-based teams shall include members of the specialized development research and development statistics activities described in sections C.2.1.i. and C.2.2.i. below.

Members of the Knowledge Services Team shall be designated as Service Leaders for each Bureau and Independent Agency Office regularly receiving DIS contract services. The Service Leader role shall include: maintain liaison with the assigned Bureau/Office; perform specific-requested research, reference and analysis work; coordinate and assist in outreach, marketing and training activities for Bureau/Office staff; facilitate communications and coordination between Bureau/Office staff and DIS contractors for requested services; review delivered products to ensure quality control; and, identify key documents, data and other development information for inclusion in the DIS and DEC contractor-maintained databases and information systems. Some Service Leaders shall be represented by the head of the management unit for a Bureau buy-in, e.g. G/DG CIU manager will lead DG sector team, ABIC manager will lead Africa Bureau team, etc., while others may be represented through their Bureau Liaison position.

C.2.1 DEVELOPMENT RESEARCH SERVICE (PERFORMANCE BASE)

The Contractor shall provide proactive and responsive reference, research, and information center services to perform the Development Research Service (DRS). These services shall be provided to the USAID development community, broadly defined above, and as directed by the Center for Development Information and Evaluation, Development Information and Outreach Division (CDIE/DIO) management. In addition, the core library, research, training and communications staff shall provide research, reference, technical and information dissemination backstop support to the Bureau research analyst staff, the specialized information center and research operations, and any future technical assistance activities defined under this contract.

The contractor shall provide 12 core research analysts (six senior level analysts, four mid-level analysts, two junior-level analysts) with each senior-level, mid-level and junior-level analyst specializing in one of USAID's six Agency strategic goal areas, i.e. Economic Growth/Agricultural Development, Democracy and Governance, Human Capacity Development, Health Population and Nutrition, Environment and Natural Resources, and Humanitarian Assistance to provide complete development research coverage of all Agency goal areas. One of the senior research analysts will serve as the Development Research Service (DRS) Team Leader. At least two full-time equivalent of this central research staff shall be devoted to supporting the PPC/CDIE/POA division's evaluation and assessment work with one of these full-time equivalents specializing in Democracy and Governance. Five of the central Development Research Service analysts shall be housed in Agency office space adjacent to the USAID Library in the Information Center, Mezzanine Level, Ronald Reagan Building. These five analysts shall backstop USAID Library staff and provide onsite research support for Agency staff in each of the six USAID strategic program areas. The remaining research analysts shall be located at the contractor's off-site facility.

The core research analyst staff shall provide the following services and support as part of the Development Research Services (DRS):

- (1) Providing research and information services to USAID missions and staff, and other members of the development community;
- (2) Retrieving information and data from USAID and external sources, including extensive access and use of online system, Internet and database search and retrieval services;
- (3) Preparing information responses, analyses, and syntheses for requestors;
- (4) Compiling bibliographies on topics of current interest;
- (5) Providing selective dissemination of information;
- (6) Developing pro-active research reports, which inform USAID staff about critical issues affecting the Agency's development program;
- (7) Briefing selected USAID staff, contractor personnel, development counterparts and the general public on the availability and usage of USAID documentation; DIS and DEC contract products and services;
- (8) Actively assisting and participating in selected USAID Mission and USAID Washington research, strategic planning, evaluation, and program/activity development efforts;
- (9) Acquiring, organizing, developing, and maintaining development resources relevant to the needs of CDIE's user community and housed in the USAID Library;
- (10) Identifying USAID-generated and -supported development experience resources relevant for inclusion in the USAID institutional memory;
- (11) Assisting with the design and production of communications materials, e.g. briefings, workshops, videotapes, and brochures for promoting CDIE/DIO information services and DIS contract services, products, and information centers;
- (12) Developing and implementing communications vehicles, e.g. research publication series, development experience workshops, contact lists and publications to effectively disseminate development experience information to targeted audiences;
- (13) Promoting knowledge sharing through the sponsorship and technical support of knowledge- and Internet-based "communities of practice";

- (14) Operating, maintaining, and fulfilling user service requests at the USAID Library;
- (15) Providing technical assistance to USAID/Washington Bureaus and Offices, USAID Missions, and LDC institutions on the development of library systems, as well as, acquisitions, reference, literature reviews, research, analysis, information survey and interview development, using communications tools, information dissemination and outreach services programs;
- (16) Providing research, reference, communications, training, outreach and other technical support to the Bureau research analyst staff;
- (17) Providing training and technical assistance in the use of the Internet and other tools for accessing, sharing and analyzing information to enhance the ability of USAID staff and development partners to achieve their development goals;
- (18) Providing training to all DIS contract staff on the technical and analytical skills, in addition to, knowledge enhancement in priority USAID development areas which are necessary to perform the services in (1) through (17) above;
- (19) Providing technical assistance services for specialized research, information analysis, and communications tasks related to items above; and,
- (20) Providing the management, administration, planning, evaluation, computer and technical support services necessary to provide the products and services above.

C.2.1.a. RESPONDING TO USER NEEDS FOR INFORMATION

The contractor shall provide about 3,000 customized research (30 minutes or more) and 7,000 reference and quick information responses (30 minutes or less) per year to requests received from USAID central and regional Bureaus, their respective overseas Missions and LDC institutions and development partners. These services shall be provided on-demand, as well as, in team, task force and collaborative working group settings.

The contractor shall perform all tasks necessary in fulfilling requests for information, including receipt, interpretation and analysis of requests; identification, retrieval and analysis of information resources; database, information network, library and institutional research; consultation with technical and program experts; filtering, interpreting and synthesizing response information; documentation and other development resource identification; referral; and communications (written, telephone, fax, email, Internet, AIDNET) with users, follow-up and evaluation feedback. The objectives of these tasks are to furnish requesters and potential information users with the development experience information or services required, refer requestors to a more appropriate source, or confer with CDIE/DIO on reasons why a request cannot be filled.

These services shall be performed by a team of subject specialist research analyst staff who can respond to in-depth research requests in each of the principal strategic areas of USAID's foreign assistance program, prepare proactive research/information products in priority development areas and provide briefings and presentations to communicate USAID and other donor development experience and technical information to the USAID development community. The research staff shall be supported by a cadre of core librarian and communication staff who are skilled in handling quick response reference requests for USAID and non-USAID development experience, technical and current awareness information materials, in addition to, editing and formatting of written information products.

The following is an illustrative list of Development Research Service requests:

- My office is preparing for a briefing before a congressional committee regarding the importance of Asia to the United States. Could you please research and prepare a information packet that contains basic facts on Asia? Some items I am interested in are economic forecasts, population growth, security interests, and key environmental issues.
- Could you please conduct a literature search regarding the use of vaginal lubricants to prevent HIV/STDs? I am particularly interested in literature that examines their use by sex workers.
- I would like to receive an information packet (relatively short and non-technical in nature) that looks at the health insurance systems in Canada, the U.K. and Germany.
- I would like to receive a brief lessons learned report, based on USAID experience, on the provision of renewable energy (off-grid) to rural based areas.
- I have been posted to Rwanda as the new Mission Director. I would like the Development Research Service (DRS) to prepare a briefing book on key development issues and questions currently facing Rwanda. I would prefer that the information be synopsized from articles rather than being provided the actual articles.
- I work in the economic growth sector in the E&E region. I would like the DRS to research the question as to why reforms in many E&E countries are stalling and/or only partial successful.
- I would like DRS to provide me with an information packet on international experience and lessons learned in civil society building activities among refugee populations which are preparing for repatriation.
- I would like information on African mango exports to the United States as well as the contact names for U.S. businesses that conduct trade with African mango export companies.
- Could you please prepare an information packet of articles and government reports on the current government structure, the role of the military, the new president, and corruption in Lebanon.
- I would like to know what missions might be implementing activities related to a competitive workforce, In particular, could you please review Results Report and Resources Request documents R4s for strategic objectives and intermediate results that fit within the overall activity I have described as a competitive workforce?

C.2.1.b RECEIPT OF REQUESTS

The contractor shall provide personnel with a management tool for receiving and logging-in all incoming requests (via letter, walk-in, fax, telephone or email). The Management Information System to be utilized by the contractor shall be approved by the CDIE/DIO CTO. The contractor shall provide system support services required to design, manage, process and report DRS management information statistics. The contractor shall examine incoming requests to determine response times for each category of requestor, and shall also determine requestors' eligibility to receive free services and products. (CDIE/DIO shall provide guidelines regarding customer priorities, response time and eligibility policies.)

C.2.1.c ANALYSIS OF REQUESTS

The contractor shall fully analyze requests to determine (1) the completeness of information provided by the requester, (2) the actual needs of the requestor, (3) the intended end-user target audience, (4) the amount of research required to fulfill the request, (5) the most appropriate sources of information needed to fulfill the request, (6) the relevancy of information retrieved through searching efforts, and (7) the selection of relevant information for transmittal to the requestor.

C.2.1.d. DATABASE SEARCHING

The contractor shall search computerized bibliographic and non-bibliographic databases, information networks, e.g. INTERNET, commercial databases, internal USAID systems, in order to retrieve information relevant to the needs of requestors. The contractor's personnel shall use CDIE/DIO's Development Experience System (DEXS), utilizing the Basis Plus database management access software language, and the CD-DEXS CD-ROM, which provide access to information on USAID-sponsored programs, activities, technical reports and other USAID experiential information and development literature. They shall also be required to search the USAID Library Integrated Online Information System (IOLS). Other USAID institutional memory database resources shall be searched, as required utilizing the USAID Intranet, Extranet and Internet website resources, to access additional USAID program, activity, sector, statistical and contract data resources. CDIE/DIO shall arrange for the necessary access to search these systems. CDIE/DIO shall coordinate contractor access to any available in-house training for Agency systems.

The contractor shall search other non-USAID databases, as needed, including, but not limited to:

- (1) On-line commercial vendor systems such as DIALOG, OCLC, Nexis/Lexis, and Dun & Bradstreet Credit Service, Columbia International Online Affairs (CIAO);
- (2) Commercial CD-ROM products such as POPLINE and ERIC;
- (3) International development organization information systems through the Internet, such as the International Development Research Center (IDRC), International Labor Organization (ILO), and the World Bank, the OECD DAC and Development Center, U.N. Dag Hammerskjold Library;
- (4) Other Internet World Wide Web resources, database systems and electronic networks, public and private;
- (5) University-supported database and catalog systems, such as InfoSouth, Land Tenure Center; and,
- (6) Other U.S. government agency on-line systems and electronic database systems, including NLM's MEDLARS, NAL's Agricola, CIA's Foreign Broadcast Information Service (FBIS), etc.

User accounts, purchases and/or exchange agreements for accessing these resources shall be established and paid for by the contractor, with the exception of systems such as DIALOG, OCLC, Nexis/Lexis, Dun&Bradstreet, and CIAO which are paid for and arranged by inter-agency agreements by CDIE/DIO.

The contractor shall provide the necessary training to keep the proposed staff current in the latest search techniques, strategies and database services and resources available from these non-USAID sources.

C.2.1.e MANUAL SEARCHES

In preparing responses to inquiries, the contractor shall use, as necessary, non-computerized retrieval and information sources -- bibliographies, abstract journals, reference works, indexes, etc.

C.2.1.f RELATIONSHIPS WITH OTHER ORGANIZATIONS

The contractor shall be required to develop effective relationships with other development partner organizations having information resources, technical experts and experience relevant to development and to call upon these organizations for assistance, as necessary. The contractor shall also consult USAID and USAID contractor technical and program experts, as required, to request support in responding to information requests of a highly technical nature or requiring extensive overseas development experience.

C.2.1.g INFORMATION PACKAGES

The contractor shall prepare information packages that are responsive to a particular request or proactively in anticipation of a particular development trend or to disseminate the latest development experience in a critical development sector.

C.2.1.g.1 TYPE AND FORMAT OF PACKAGES

A wide variety of custom-made information products shall be provided in responding to requests. Information packages shall consist of appropriate analyzed and synthesized development experience, current awareness, statistical, methodological and/or technical information; reviewed and selected relevant computer print-outs, electronic files and database subsets, bibliographies, custom-made directories and listings, documents, audiovisuals; and other similar materials for transmittal to requestors. The contractor shall prepare suitable transmittal letters and memos, cables, emails, etc. following format guidelines provided by CDIE/DIO.

C.2.1.g.2 ANALYSIS OF REQUEST PATTERNS

The contractor shall make recommendations to CDIE/DIO regarding information and communication packages, products, mechanisms and services that, based on patterns of persistent or strong requestor interest, shall be created to fulfill anticipated future end user needs. Upon approval by CDIE/DIO, the contractor shall perform the information services necessary to develop these materials.

C.2.1.g.3 DOCUMENT DISTRIBUTION

The contractor shall perform all tasks necessary to identify documents that fulfill requestor requirements and shall make arrangements for document copies to be provided to users. For this task, the contractor shall:

- (1) Generate orders and forward these to the document distribution unit of the DEC contract, which has capabilities for providing hard copy, microfiche and electronic reproduction and transmission of requested USAID documents.
- (2) When necessary, reproduce documents held by other information facilities and forward these directly to the requestor.
- (3) Arrange for USAID Library staff to perform all Inter-Library Loan (ILL) tasks in order to obtain documents required by requestors, but not available in the USAID Library. This shall entail identifying appropriate sources for needed documents via searches of Online Computer Library Center (OCLC) files, and from knowledge of organizations having specialized development-related resources. CDIE/DIO shall fund all costs associated with OCLC ILL services. The contractor shall pay for all other costs associated with inter-library ILL charges.
- (4) Draw upon other sources used by CDIE/DIO including, but not limited to, The World Bank, USAID contractors, and other federal agencies and development organizations, etc.

C.2.1.h RESEARCH SERVICE REPORTING

Each core research analyst shall be required to respond to, track and report, through the DIS management information system, Bureau and Mission inquiries for services and follow-up actions.

C.2.1.i SPECIALIZED DEVELOPMENT RESEARCH SERVICE ACTIVITIES (PERFORMANCE BASE)

The contractor shall provide customized research, reference, analysis, communications, information center and technical assistance services, as described in sections C.2.1.a through C.2.1.h, and section C.3 for USAID/W Bureaus/Offices and on tdy's to USAID Missions. These specialized Development Research Service activities shall be well integrated with the core Development Research Service staff and the overall DIS Knowledge Services Team.

C.2.1.i.1 BUREAU RESEARCH ANALYSTS

The contractor shall provide Bureau research analysts for the following USAID/Washington Bureaus/Offices: Asia and Near East (1 Senior Research Analyst), Latin America and the Caribbean (1 Senior Research Analyst), and Africa (1 Mid-level Research Analyst which is also one of the six ABIC positions in C.2.1.i.2. below). (Note: Future additional Bureau research analysts for Europe and Eurasia, Global Bureau, BHR Bureau, etc. shall be accommodated through the Additional Core DIS Services Option in section C.9.1. below.)

Some of these analysts shall also perform Service Leader functions linking Bureau/Office and Mission staff to CDIE/DIO information services. Each analyst shall be responsible for identifying Bureau, Center and Mission staff development experience information needs, identifying information resources, analyzing and selecting appropriate information and synthesizing the research results into a tailored information package. Each "regional" and "central" Bureau research analyst shall specialize in regional development and "central" Bureau policy and strategic issues, respectively. Each analyst shall act with a high degree of freedom to design and implement an information program tailored to their Bureau's/Office's information needs. Each analyst shall be supported by DIS management and core research, library, social science/economic analyst, training, and communications staff. The Bureau research analyst staff shall work at the contractor's off-site facility.

Each Bureau research analyst shall be responsible for providing timely and thorough research and reference services to USAID staff and development partners in Washington and in the field.

The research analyst shall:

- (1) Perform analysis and synthesis of development experience to meet the needs of the assigned Bureau. This shall include the provision of substantive research products and services undertaken with Agency and Bureau strategic objectives in mind. The research analyst shall anticipate, whenever possible, Bureau and Mission queries, and develop products to meet them.
- (2) Increase USAID staff awareness of the wide range of information services and products available to them through the DIS and DEC contracts. The research analyst shall refer research requests to DIS staff with sectoral expertise when appropriate. The analyst shall also identify topics worthy of analysis, undertake special research projects, and prepare special reports for the Bureau, as time and request load permit.
- (3) Remain current on USAID programs and trends and priorities in international development and specifically the regional or central thematic area assigned, and shall share relevant information with Bureau and DIS contract colleagues. The research analyst shall develop new mechanisms for sharing this information.

- (4) Access online development resources from USAID and non-USAID information resources including the United Nations, the World Bank, other donor agencies, PVOs, commercial databases, and the Internet. The research analyst shall also consult with experts working in the field of international development.
- (5) Develop and maintain contacts with USAID staff and individuals within the development community at large as a key resource person.
- (6) Respond to, track and report, through the DIS management information system, Bureau and Mission inquiries for services and follow-up actions.

C.2.1.i.2 ABIC

Purpose/Background

The contractor shall provide general development information support and special assistance for democracy activities to the Bureau for Africa through its research services, newsletters, website, and specialized reference collection. Information provided shall be from a variety of sources, including USAID, donor organizations, PVO's, and African government and non-government organizations. Information shall be provided to USAID staff and contractors, in Washington and USAID Missions, African non-governmental organizations and institutions, and the general public, provided that the information is USAID-related.

The contractor shall provide a Senior Manager/Editor for ABIC, as well as, a combination of one mid-level Writer/Editor, a Mid-level Web Development Specialist and three Research Analysts (two mid-level analysts [one is the Africa Bureau Analyst above] and one junior analyst) to operate and maintain ABIC. All ABIC staff shall be located at the contractor's off-site facility. Services provided shall include, but are not limited to, the following activities: answering information requests, both in-depth research and quick response reference services; preparing issue briefs; developing bibliographies; compiling country and/or sector data; and editing assistance. The contractor shall also provide information on USAID programs, activities and documents from USAID's Development Experience System (DEXS) and access worldwide information sources such as Dialog, Lexis/Nexis, the World Bank, IDRC, UN databases, and online catalogues of major libraries.

The contractor shall produce and print Bureau newsletters. Current demand is for three newsletters – one on USAID democratization activities in Africa (African Voices, approximately 3,500 copies per quarter, 90% external distribution), the second on activities of the Africa Bureau's Office of Sustainable Development (AFR/SD Developments, approximately 2,000 copies per quarter, 100% internal distribution), and the third highlighting AFR/SD's analytical work (SD Abstracts, approximately 2,000 copies per quarter, 75% internal distribution).

The contractor shall develop and maintain the USAID Africa Bureau's external World Wide Web and internal sites, which are an important resource to provide information about USAID's policies and its program of assistance to Africa. The Africa Bureau newsletters, as well as Internet guides and other publications shall be available on the appropriate Web sites.

The contractor shall provide the ABIC staff with computer hardware/software acquisitions and support, printing services for ABIC publications and technical support for database development and LAN maintenance. Distribution of ABIC publications will be performed by the DEC contractor.

The contractor shall fund the cost of travel and associated expenses to USAID Missions in Africa to provide the field with technical assistance and to assist Mission staff for up to two weeks. All travel will be approved by the Africa Bureau project officer prior to the TDY. The contractor shall also pay travel and associated costs for ABIC staff to attend the yearly African Studies Association conference to assist in information dissemination and to assess trends and issues in the African Studies field.

DIS and Africa Bureau Support

The ABIC function shall be supported by and is dependent upon the DIS contract central management, technical, library, and communications staff. This central staff will provide technical assistance, support and guidance to the ABIC staff and information center activity. There shall be one USAID direct-hire Africa Bureau Staff person overseeing this function. That function currently resides in AFR/DP.

The contractor shall provide off-site facility space and support (see section C.8.3) for up to six ABIC professional and administrative support staff, including the Africa Bureau research liaison analyst under the DIS contract. Adequate facility space shall be provided to house the 2,000 - 3,000 volume ABIC library. The contractor shall also provide printing services for all ABIC publications, such as African Voices, SD Abstracts, SD Development, the Technical Paper Series (up to 10 papers per year, approximately 500 copies per paper, 50% external distribution), and an annual report (approximately 1,500 copies per year, 50% external distribution). The contractor shall also produce a compendium of SD information resource on CD-ROM (1,000 copies per year). The DEC contractor shall provide mailing list maintenance and distribution services support for ABIC publications. The DIS contractor shall provide technical support services for ABIC personal computer workstations, hardware and software. The DIS contractor shall provide courier services, office and computer supplies to support the ABIC operation.

The DIS contractor shall provide the following types of services for the entirety of the Bureau for Africa:

Reference & Information:

- (1) Develop and maintain an Africa Bureau Information Center. Organize and maintain the Africa Bureau's technical documentation; develop and acquire materials pertinent to USAID's work in Africa, including, but not limited to, democratization and governance activities.
- (2) Develop and maintain African country-specific subject files. Produce formatted reports as needed.
- (3) Identify and maintain relevant democratization/governance information on research, organizations, experts, seminars/meetings, and USAID mechanisms.
- (4) Develop and update democracy/governance country profiles.
- (5) Provide reference services including finding and verifying facts, locating documents, publications and organizational information.

Publications/Communications

- (1) Develop, design, produce, and print Africa Bureau quarterly newsletters. This includes writing (approximately 50% original articles), editing, design and production.
- (2) Provide editing, production and printing services for AFR/SD technical documents and general AFR reports. Develop distribution mechanisms for documents.
- (3) Develop appropriate mailing lists for above publications.
- (4) Locate and disseminate information pertinent to USAID's work in Africa, including democracy/governance issues in Africa, to African organizations, missions and USAID staff, as well as the general public.
- (5) Research and introduce new communications tools, such as the concept of the e-note, and use of CD-ROM for the purpose of wider dissemination of research materials.

- (6) Write bimonthly What's New at ABIC messages; also bimonthly Article Alert to the Missions and AFR/W.
- (7) Write quarterly DG info emails.
- (8) Continue to develop and modify the Africa Bureau Internet and Intranet websites as necessary to better serve the needs of the Bureau. Create and strengthen connections between USAID and other USG Department/Agency websites with programs or interests in the Africa region.
- (9) Related to the websites, conduct a periodic (one per year) survey of internal and external partners of the Africa Bureau to determine the information needs of Agency staff and their customers, including African institutions, PVOs/NGOs, donors, the academic community, and the general public.
- (10) Conduct outreach within the Bureau to encourage the use of the websites, the contribution of material to the websites, and to ensure that the information remains up to date.
- (11) Work with an Africa Bureau Web site steering committee to ensure that the sites address the needs and concerns of the Bureau and coordinate development of the Web sites with the Development Planning Office. Provide regular reporting to the Africa Bureau on progress made and lessons learned while developing the websites.
- (12) Develop and maintain links to other websites of critical interest to the Africa Bureau.
- (13) Monitor information requests from website visitors and forward them to appropriate Africa Bureau staff or contractors, or respond to requests when appropriate. Monitor the use of the Web sites and compile user data.
- (14) Stay abreast of on new developments in Internet and Web technology, such as Internet browsers, JavaScript, databases, and interactive pages, and incorporate them into the Africa Bureau sites as appropriate.

Research/Analysis

- (1) Provide research services including identification, analysis and synthesis of development experience information to assist Bureau staff in their work.
- (2) Explore how new AFR Bureau staff might want to use ABIC for special research or analytic projects.

Training

- (1) Provide bureau office briefings on ABIC services.
- (2) Provide one-on-one or group Internet training as requested.

C.2.1.i.3 ANE BUREAU SPECIALIZED RESEARCH OPERATIONS

The contractor shall provide the following four additional contract staff to support Asia and Near East Bureau operations. All ANE Bureau contract staff will be located at the contractor's off-site facility.

C.2.1.i.3(1) SECOND ANE BUREAU RESEARCH ANALYST

The Asia and Near East Bureau requires daily analysis of information for crisis situations in the Asia Near East region, such as the one currently in E.Timor. The Bureau needs constant analysis of information from a variety of information sources including the Internet, STATE, DOD or CIA reports, and incoming USAID mission reports to produce daily situation reports for the USAID Administrator's Office, Congress, other USG agencies and the general public.

The contractor shall provide a second full-time mid-level research analyst for USAID's Asia and Near East Bureau who is responsible for providing timely and thorough research and reference services to USAID staff and development partners in Washington and in the field.

The research analyst shall:

- (1) Perform analysis and synthesis of development experience to meet the needs of the Asia and Near East Bureau. This shall include the provision of substantive research products and services undertaken with Agency and Bureau strategic objectives in mind. The research analyst shall anticipate, whenever possible, Bureau and Mission queries, and develop products to meet them.
- (2) Increase USAID staff awareness of the wide range of information services and products available to them through the DIS contract. The research analyst shall refer research requests to DIS staff with sectoral expertise when appropriate. The analyst shall also identify topics worthy of analysis, undertake special research projects, and prepare reports for the Asia and Near East Bureau, as time and request load permit.
- (3) Remain current on USAID programs and trends and priorities in international development and specifically the Asia and Near East, and shall share relevant information with Bureau and DIS colleagues. The research analyst shall develop new mechanisms for sharing this information.
- (4) Access online development resources from USAID and non-USAID information resources including the United Nations, the World Bank, other donor agencies, PVOs, commercial databases, and the Internet. The research analyst shall also consult with experts working in the field of international development.
- (5) Develop and maintain contacts with USAID staff and individuals within the development community at large as a key resource person.

C.2.1.i.3 (2) ANE Bureau Web Development Specialist

The contractor shall provide a Mid-level Web Development Specialist responsible for developing and maintaining the USAID Asia Near East Bureau Internet and Intranet websites. The external site will serve as an important communication channel through which the ANE Bureau and its missions can share information with partners, stakeholders, and the general public. The internal website will provide a mechanism to share information related to ANE programs and publications with Agency colleagues. The individual will develop these websites as well as work with bureau staff to create and maintain the website content. The Web Development Specialist is also responsible for developing/maintaining specialized e-mail lists in the event that they are required for Bureau outreach activities.

The ANE web development specialist shall:

- (1) Work closely with the ANE/ORA office and others within the USAID ANE Bureau to shape the way in which ANE presents its outreach message through its websites. Conceptualizes, designs, develops, and maintains ANE internal and external websites.
- (2) Work on communication and outreach tasks for the ANE Bureau, including writing/formatting/dissemination of discrete products as requested by ANE Bureau staff.
- (3) Work with ANE Bureau staff to identify potential sources of information for website. Compiles, develops, and/or modifies information, as necessary, for inclusion on the Bureau site.
- (4) Consult with the Agency's Legislative and Public Affairs (LPA) office to obtain clearance on the final external website structure and other issues, as needed. Coordinate with the Agency's Information and Resource Management (IRM) office to put the prototype(s) into operation and obtain appropriate access rights to the Agency's network.
- (5) Conduct outreach both within and outside the Agency to encourage the use of the website(s), as well as the contribution of material to the site. Demonstrate access to the website as appropriate.
- (6) Survey Bureau partners and stakeholders to ascertain the utility of the information found on the website to them, and to encourage their contributions of appropriate materials.
- (7) Work with an ANE Bureau website steering committee to ensure that the website(s) address the outreach needs and concerns of the Bureau.
- (8) Monitor information requests from website visitors and forward or respond to requests, as appropriate.
- (9) Monitor the use of the website and compile user data.
- (10) Keep up-to-date on new developments in Internet and web technology, as appropriate.

C.2.1.I.3 (3) ASIA AND NEAR EAST BUREAU WRITER/EDITOR

The contractor shall provide the Asia and Near East Bureau with a full-time, mid-level, writer/editor to assist the Asia and Near East Bureau with outreach and communication efforts.

The Asia and Near East Bureau is actively involved in using the Intranet and Internet as a mechanism to systematically communicate with audiences both within and outside the Bureau, with the ANE-funded DIS contract web development specialist. The ANE Bureau recognizes the importance of informing the wider public about the nature and impact of development activities that have been and are being undertaken by USAID in the ANE region in order to garner their support and their advice. The potential audience for the ANE outreach function includes other USG agencies, Congress, NGOs, foundations, universities, other academic institutions, corporations, the general public, and any other organization with interests in the ANE region.

To more effectively communicate to a variety of audiences, the contractor shall provide the ANE Bureau with the services of a full-time writer/editor. The writer editor shall:

- (1) Provide publications and editorial support to the ANE Bureau. The writer/editor shall write substantive material for inclusion on both the external and internal web sites, edit material produced by specific offices within the Bureau, and provide other writing and editorial support as needed.

- (2) Work closely with the ANE Webmaster and ANE Bureau staff to ensure that content on the Bureau Internet and Intranet websites is accurate, readable, and represents the message ANE wants to communicate.
- (3) Prepare and/or edit success stories, program information, information on business opportunities, lessons learned, as well as examples of ongoing development challenges relating to USAID activities in the ANE region.
- (4) Prepare additional materials for inclusion in Bureau newsletters or brochures.

C.2.1.I.3 (4) ASIA AND NEAR EAST BUREAU INTERNET FOR DEVELOPMENT ADVISOR

Background and Objectives

As interest in expanding use of the Internet to further sustainable development has grown, the ANE Bureau and its Missions are increasingly identifying opportunities for meaningful participation. Some ANE Missions already have the capacity to develop Internet initiatives but better focus and coordination would result in realized opportunities both bilaterally and regionally. The need for a Bureau Internet for Development Advisor has been highlighted through the participation of Morocco, Egypt, and eventually India (when sanctions are lifted) in the President's Initiative on Internet Access for Economic Development. In addition to the demand for technical advice and backstopping for the Missions participating in the President's Initiative, the bureau has opportunities to proactively explore integration of Internet technology into ongoing regional and other bilateral programs in ANE.

The Senior Internet for Development Advisor shall provide technical assistance to USAID's Asia and Near East (ANE) Bureau to expand USAID development objectives in the region. The Advisor shall support ANE Missions' participation in the President's Initiative on Internet Access for Economic Development, assist the ANE Bureau to integrate the use of the internet into planned and ongoing Bureau programs and strategies, and facilitate broader and better Internet connectivity in ANE countries to achieve the bureau's developmental objectives and advance E-Commerce aims that can assist ANE countries compete in a global economy.

Organizational and Supervisory Relationships

The USDH Chief of the Strategic Planning and Analysis Division in ANE/SEA will be the primary contact point within the Bureau for the Internet Advisor, and will be responsible for providing guidance and approval for any Washington funded expenditure as well as approval of the representation of the activity within USAID and to external stakeholders.

The Internet for Development Advisor shall be located in the DIS contractor-provided facility, but will also use available space in the ANE Bureau, as appropriate, to facilitate his/her work. S/He shall work closely with the Department of State's Office of International Communication and Information Policy; Department of Commerce; the U.S. Trade Representative; Department of Energy; the Federal Communications Commission; and other U.S. departments/agencies that are active members of the Interagency Working Group on the Internet for Economic Development Initiative. The results of these liaison activities shall be communicated to appropriate offices and individuals to inform decision making within the ANE Bureau.

With the approval of the Chief of the Strategic Planning and Analysis Division, ANE/SEA s/he shall establish links with appropriate entities within the World Bank and non-governmental partners (e.g., Cooperating Agencies in all goal areas, U.S. universities, foundations, and businesses), and carefully coordinate ANE supported efforts with their interests and activities. The Advisor shall effectively respond to, and represent, the interests of ANE Missions in furthering the expanded use of Internet technologies to achieve development objectives. Her/his abilities to bring together the interests of the above parties, while also ensuring development of sound technical strategic approaches, will be key measurements of the Advisor's effectiveness. The Advisor shall employ team approaches that incorporate ANE Mission and Bureau technical personnel, as well as other Agency units, e.g., Global Bureau centers/offices, in carrying out many of the specific duties defined below.

Specific Duties

The ANE Internet for Development Advisor shall provide strategic and technical leadership in the design and promotion of strategies in the field and in Washington that advance the effective use of Internet as a tool to support development objectives. Specific duties shall include:

- (1) Develop, for ANE Bureau approval, priorities and recommended activities for expanded Internet deployment to accelerate achievement of sustainable development objectives.
- (2) Provide the Bureau with recommendations for integrating the use of the Internet into ANE regional programs to both broaden their impact and support their implementation. Regional initiatives include AERA, SARI, Regional AIDS program, and the Middle East Trade and Investment Initiative.
- (3) Under direction of appropriate ANE Bureau staff, develop collaborative work relationships and facilitate the engagement of U.S. non-governmental partners in designing and implementing ANE Bureau-approved interventions that expand the use of the Internet in the ANE region.
- (4) Provide technical assistance to ANE Missions to expand their understanding of and use of Internet technology within their ongoing and planned programs.
- (5) Develop work plans and identify implementation mechanisms (e.g., the U.S. Telecommunications Training Institute Cooperative agreement, Learn Link's IQC, and other Global Bureau arrangements) that support Internet for Economic Development aims in ANE bilateral and regional programs.
- (6) Through collaboration with other donors, identify opportunities for ANE involvement in expanding the use of the Internet for development purposes.
- (7) Organize regional fora or other mechanisms for training and sharing information about Agency successes and lessons learned from the use of information technology applications with USAID field Missions, other U.S. agencies, and NGOs (e.g., universities, think-tanks, foundations, etc.)
- (8) Develop communications strategies to promote the Internet Economic Development activities in the ANE region to USAID operating units, partners, regional institutions, the Congress and the general public. Guide the development and production of briefing materials to provide information outreach to these entities on Internet Economic Development activities in the ANE region. Provide advice and guidance to the Bureau on improving its web site.
- (9) Travel throughout the ANE region, including the countries specifically cited in the VP's Initiative, i.e., Morocco and Egypt, as well as other strong candidates for emphasis support, such as, India.
- (10) Become familiar with USAID requirements for identifying and securing short-term technical assistance for ANE field missions.

Work Plans and Reports

ANE's Internet for Development Advisor will develop with his/her direct hire primary contact person a series of three-month work plans defining specific activities and schedules in consultation with key missions, ANE Goal area team leaders, and the chief of ANE/RSP. These work plans will be consistent with the long-term ANE Bureau strategy for priority activities to be undertaken over each 2-year strategic planning period.

The Advisor is expected to spend between 30-40% of her/his time in the field with missions and/or counterparts and will be required to prepare trip reports on country consultations. The Advisor will provide quarterly progress reports citing major accomplishments, and/or key issues, along with brief notes on any key meetings organized or attended (to include names of participating individuals/organizations).

C.2.1.i.4 GLOBAL BUREAU CENTER FOR DEMOCRACY AND GOVERNANCE CENTER INFORMATION UNIT (CIU)**PURPOSE**

The Center Information Unit (CIU) shall increase the Center for Democracy and Governance's research, information and communications capacity as a center of technical excellence, and shall assist the Center's technical assistance to USAID missions and USAID development partners.

The CIU contract service function of the DIS contract shall play a critical role in improving G/DG program effectiveness and expanding its program reach to a highly decentralized audience of USAID Missions, development partners and practitioners around the world.

In the performance of its role, the CIU shall continue to exercise a high degree of freedom in designing its research, communication, training and technical assistance program in accordance with the Center's evolving democracy and governance program needs. All CIU contract staff shall be located at the contractor's off-site facility.

CIU RESEARCH SERVICES

The CIU shall provide research services through the CIU Program Manager/Senior Research Analyst and a second Senior Research Analyst. The following is an illustrative list of research services provided in the past and examples of potential future work products.

- (1) Responses to requests for DG-related information from DG staff, USAID Missions and from other USAID bureaus;
- (2) World-wide inventory of USAID DG activities;
- (3) Research and writing subsectoral background information in support of G/DG Center documentation;
- (4) Research, writing and/or editing of primary G/DG Center reports on sector trends, innovative subregional programs or regional strategies; and,
- (5) Analysis of DG subsectoral and regional trends.

CIU COMMUNICATION PRODUCTS AND SERVICES

The contractor shall provide a Senior Writer/Editor and a Research Assistant to develop, design, produce and disseminate G/DG communications and contributing articles to other G/DG communications. The following is an illustrative list of communication services provided in the past and examples of future work products:

- (1) Up to 20 (twenty) G/DG Center-produced technical publications "released" or "launched" for maximum public exposure;
- (2) Producing and disseminating up to 10 (ten) issues of Democracy Exchange, a periodic electronic newsletter, to inform field and Washington DG staff of G/DG Center issues;
- (3) Design, manage and maintain a democracy and governance web site on behalf of the Agency;
- (4) Maintain sectoral and subsectoral mailing and e-mail lists;
- (5) Train G/DG Center staff in the use of DG Intranet and Internet information resources;

- (6) Design and perform up to 2 (two) customer surveys to evaluate G/DG Center communication product effectiveness; and,
- (7) Write and edit up to 1 (one) G/DG Center Report.

The CIU contractors shall provide the following list of communication product deliverables during the course of this contract.

- (1) Edit and update overall Center information pamphlet up to twice per year;
- (2) Edit and update four subsector information pamphlets up to twice per year:
 - . Rule of Law
 - . Elections/Political Processes
 - . Civil Society
 - . Governance;
- (3) Edit and update the G/DG User's Guide up to 3 (three) times per year (a field-oriented guide which presents G/DG Center staff, structure and implementing development assistance program mechanisms and how they may be accessed);
- (4) Publish up to 3 (three) Democracy Dialogue/Technical Notes per year; and,
- (5) Write and disseminate Democracy Report (electronic publication) - one Report produced for each Tuesday Group meeting (approximately 30 [thirty] per year).

In addition, the contractor shall provide one Mid-level Web Development Specialist to design and maintain the G/DG Center 's Internet and Intranet websites. The contractor shall develop cost-effective, tailored, sector-specific, web pages containing G/DG technical information for dissemination on the Agency Intranet and external World Wide Web for use by democracy and governance practitioners worldwide.

CIU TRAINING AND TECHNICAL ASSISTANCE SERVICES

The training and technical assistance services provided by the Center Information Unit shall be offered in an integrated package with the other CIU research services, communications products, democracy and governance data and information services. The contractor shall provide one Mid-level Training Specialist to implement the CIU training and technical assistance services program, in consultation with G/DG leadership and senior technical staff, identifying training needs among G/DG staff and USAID DG officers and developing creative methods for meeting those needs.

CIU TRAINING

The contractor shall provide the following technical training and support services in support of the G/DG program:

- (1) Work with G/DG Center leadership and technical team representatives to develop a creative and effective annual training agenda to communicate DG technical information to a diverse audience (including U.S. democracy officers and host country nationals). Use evaluations, "lessons learned" from past DG Officers Conferences, and needs assessment surveys to improve training methods for future training activities. In consultation with G/DG Program Officer and CIU Program Manager, prepare estimated budget for annual training agenda;
- (2) Work with Center leadership and appropriate Center technical staff, manage design and planning process (both substance and logistics) for up to 2 (two) G/DG Partners Conference per year. Facilitate participation of partner organizations in determining conference agenda;

- (3) Work with Center leadership and appropriate Center technical staff, manage design and planning process for up to 2 (two) Regional DG Officers Training Conferences/Workshops per year. Work with technical teams to establish learning objectives and design curricula to meet those objectives. Manage all logistical details of conference. Work with Web Developer to use G/DG intranet to improve dissemination of training materials to DG Officers;
- (4) Coordinate acquisition of short-term consultant support to assist with training and conference planning (as needed);
- (5) Coordinate Washington-based DG training efforts for incoming New Entry Professionals (NEPs) and Presidential Management Interns (PMIs);
- (6) Assist G/DG technical teams in conceptualizing and organizing subsector-specific events, e.g., labor workshop in the LAC region or Washington-based elections conference (as determined by G/DG Info Unit quarterly work plans). Assist technical teams in articulating goals and objectives of events, and planning the events to meet those goals and objectives;
- (7) Develop/maintain "tracker" of all G/DG-funded conferences, workshops, etc., and how they support G/DG's technical leadership agenda;
- (8) Work with selected G/DG team to design, implement and evaluate pilot distance learning modules within the DG sector (e.g., democratic local governance or anti-corruption). Use evaluations and "lessons learned" to design and implement future distance learning modules;
- (9) In consultation with G/DG senior staff, identify specific training needs of G/DG staff and organize "brownbag seminars" to meet those needs; and,
- (10) Develop, disseminate, and maintain "TDY Prep Packs" for G/DG staff.

CIU TECHNICAL ASSISTANCE

The contractor shall provide technical assistance coordinator services to support the G/DG Center in providing cost-effective DG program approaches to USAID Bureaus and Missions, USAID-funded staff and NGOs. The contractor shall provide assistance in Center planning and reporting documentation and in integrating democracy and governance methodologies into project and program evaluation, assessments, strategic planning, program planning, project design and/or field research.

CIU PRODUCTS/SERVICES WORK PLAN

The contractor shall prepare a quarterly work plan for submission and approval by the G/DG Center which provides a detailed list of products and services to be worked on and delivered by CIU staff during the next quarter as specified in this contract scope. It shall also identify other CIU products and services not explicitly required under the CIU scope, but which are required by the G/DG Center to meet additional research, communication, training and technical assistance needs during the quarter. These work plans will indicate, as appropriate, when the products are to be delivered and will specify the relative priorities. The quarterly work plans are to be approved by G/DG Center management.

At the end of each quarter, the Center Information Unit will report on the products and services it has delivered to the G/DG Center in compliance with the work plan during the quarter.

CIU TECHNOLOGY STANDARD REQUIREMENTS

Word processing software used by all CIU staff service providers and short-term TA/Training service providers must be compatible with Microsoft Office Suite Word 97, or future Agency word processing standards.

C.2.1.i.5 PPC OFFICE OF DEVELOPMENT PARTNERS RESEARCH ANALYST

The contractor shall provide one Senior Research Analyst to assist the staff of the USAID Office of Development Partners to improve the complementarity of USAID and other donor programs through the appropriate exchange of information, both from Multilateral Development Banks (MDBs) and bilateral organizations. The Senior Research Analyst shall be located at the contractor's off-site facility.

RESPONSIBILITIES:

The research analyst shall serve as liaison between the Office of Development Partners and USAID Mission and Bureau Offices to ensure the timely dissemination of information concerning new activities of the MDBs. The contractor shall:

- (1) Manage and operate the Office's computerized information system (EPN- Early Project Notification system) that identifies problems with MDB projects that impact on USAID programs and projects;
- (2) Obtain current monthly project lists from the MDBs and notify relevant USAID Missions and Bureau Offices of new projects being developed by the Banks;
- (3) Maintain communication with USAID Missions and Bureau Offices concerning new MDB activities through electronic mail, bulletin board systems, or newsletters. Coordinate and document Mission and Bureau issues and concerns with these new projects. This communication should include among other things, the World Bank's weekly seminars list, weekly loan schedule, and U.S. executive director notifications;
- (4) Manage the Office's information database file on MDB projects. Log into the file information on all new MDB projects, as well as any correspondence with USAID Missions and Bureaus concerning these projects. Keep records of all MDB scheduled meetings and alert relevant Office staff of such meetings;
- (5) Manage the Office's document center and document distribution system. Work with the DEC contractor document distribution unit staff to ensure timely distribution of all documents from MDBs that are received by the office;
- (6) Attend scheduled meetings at Treasury to provide USAID comments on MDB projects;
- (7) Attend monthly environmental Tuesday Group meetings;
- (8) Coordinate and assist in preparation of case studies relating to the operation of the New Partnership Initiative (NPI), using a framework preferred by the Office of Development Partners;
- (9) Manage the Development Assistance Committee (DAC) statistics, documents, and electronic information that are maintained by the Office of Development Partners. Actively collect documentation from bilateral donor organizations;
- (10) Synthesize and analyze current MDB and bilateral donor activities;
- (11) Respond to requests for information on MDB and bilateral donor activities from USAID staff;
- (12) Contribute to the identification and retrieval of materials to be added to the Development Experience System (DEXS); and,
- (13) Contribute to the reporting requirements of the DIS contract, including maintenance of monthly statistics and completing entries in the DIS project management information system.

C.2.2. DEVELOPMENT STATISTICS SERVICE (PERFORMANCE BASE)

A key function of the CDIE Development Information and Outreach Office (CDIE/DIO) is to facilitate USAID management's access to economic, social and other statistical data and information needed to allocate and effectively use development resources, as well as, measure social and economic development impact in developing countries. Toward this end, CDIE/DIO has developed and manages the Agency's Economic and Social Data Base (ESDB), an on-line information system that provides access to macro-level, international, economic and social statistical data. The DIS contractor shall operate and maintain the ESDB resource and shall serve as an intermediary: translating user needs into data requirements; expediting access to appropriate Agency and external source statistical data; performing research and analysis on all forms of social, economic, trade and financial data which describe, define and measure developing country (LDC) conditions; and, presenting the data in meaningful display formats using different media.

The contractor shall provide six social science/economic analyst staff (three senior-, two mid- and one-junior-level) to perform the following technical and professional support services needed to sustain the Economic and Social Data Base (ESDB), the Development Statistics Service (DSS) and to backstop the Bureau analysts work with the Central and Regional Bureaus, USAID Missions and CDIE's program operations and initiatives. One of the senior social science/economic analysts shall serve as the Development Statistics Service (DSS) Team Leader. Another senior analyst shall have experience in the Africa Region. The third senior analyst shall specialize in supporting PPC Bureau goal review, APP and APR requirements. All analyst staff shall be located in the contractor's off-site facility.

C.2.2.a. DEVELOPMENT STATISTICS SERVICE (DSS)

The Development Statistics Service contract staff shall provide for the coordination of all key DSS requirements and services: from data identification and selection, through to data acquisition, processing and maintenance, to the final provision and dissemination of core data products, data research and analytical services. Accordingly, this shall include:

- (1) Developing and enhancing DSS data acquisition strategies and schedules, including coordination with major statistical data sources in the U.S. government, multilateral donor organizations, and the private sector;
- (2) Providing value-added research and analytical services and products, proactively for, and, in response to requests from USAID staff in Washington and in the field, and from members of the development community;
- (3) Backstopping and supervising the technical and analytical services provided by the DSS Bureau Liaison analysts;
- (4) Providing program management support to the DSS Bureau analysts;
- (5) Developing DSS orientations for new project staff as well as developing an on-going training curriculum for Bureau staff.

C.2.2.b THE ESDB STATISTICAL DATA REPOSITORY

The Central DSS staff shall acquire, maintain and disseminate data from over fifty (50) major international and U.S. Government, external-source statistical databases in the ESDB system. These include some of the following data sources:

FREEDOM HOUSE FOUNDATION

Freedom House Indices

HERITAGE FOUNDATION

Index of Economic Freedom

INTERNATIONAL MONETARY FUND

Balance of Payments

Direction of Trade

Government Financial Statistics

International Financial Statistics

ORGANIZATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

Beyond 20/20

DAC On-Line

Geographic Distribution of Financial Flows

TRANSPARENCY INTERNATIONAL

Corruption Perceptions Index

UNITED NATIONS

FAO Agriculture and Food Trade

FAO Agricultural Production

FAO Fertilizer

FAO Food Aid

FAO Food Balance Sheets

FAO Forest Products

FAO Land Use

FAO State of Food and Agriculture 1998

Human Development Report

State of the World's Children

TPIS: UN Trade System

UNESCO Statistical Yearbook

Urban and Rural Places

Women's Indicators and Statistics (Wistat)

World Population Prospects 1950-2050

World Health Statistics

UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT

U.S. Overseas Loans and Grants

UNITED STATES CENTRAL INTELLIGENCE AGENCY

World Factbook

UNITED STATES DEPARTMENT OF AGRICULTURE

PL480 Data Base

Production, Supply, & Distribution Database (PS&D View)

World Agriculture Trends and Indicators

UNITED STATES DEPARTMENT OF COMMERCE

BUCEN's HIV/AIDS Surveillance Data Base
BUCEN's International Database
BUCEN's U.S. Merchandise Trade
National Trade Data Bank

WORLD BANK

African Development Indicators
*FSU *STARS**
Global Development Finance
International Comparison Project
World Bank African Database
World Development Indicators
World Development Report

WORLD RESOURCES INSTITUTE

World Resources Database

WORLD WATCH INSTITUTE

World Watch Database

C.2.2.c MAINTAINING AND OPERATING THE ESDB

The contractor shall provide the following services to maintain and operate USAID's central repository for economic and social statistical data via the Economic and Social Data Base (ESDB).

- (1) Monitor Agency data use and anticipate changing trends, in future data needs.
- (2) Develop, support and implement data acquisition strategies for identifying pertinent data sources and acquiring new databases for inclusion in the ESDB. An aggressive acquisition strategy is essential to the ability of the contractor to expedite USAID management access to a broad-range of economic, social and other statistical data relevant to developing countries.
- (3) Select and acquire relevant statistical data in electronic format that covers all developing countries where USAID has programs. (The USAID Office of Information Resources Management [M/IRM] will provide the necessary technical support to maintain a USAID-provided client-server operation where the ESDB data system is housed in the Ronald Reagan Building, Washington, D.C. The ESDB system is currently on a Windows NT Client Server running SAS Intrnet software from the SAS Institute. IRM also provides and maintains 10 copies of SAS PC for Windows workstation software and 1 copy of SAS Applications Development Studio software for DSS contractor use.
- (4) Verify the accuracy of all data sources processed and stored in the ESDB system.
- (5) Acquire and maintain summary documentation and reference materials that provide, in electronic and hardcopy form, relevant information on all databases in the DSS inventory (100 events per year).
- (6) Develop and maintain a system, in electronic and hardcopy form, which tracks the status of all DSS database update schedules.

- (7) Identify, obtain and maintain summary documentation that provides relevant information on all potential new international sources databases (100 data source inquiries per year).
- (8) Develop, systematize, and implement ESDB database access techniques, ESDB user interfaces, ESDB website development, and ESDB processing procedures that facilitate access to the ESDB by USAID staff using Agency-provided standard software applications (currently SAS Intrnet, Netscape 4.0 and MS Explorer 4.0 Internet web browsers, MS Office 97 Excel and Access).
- (9) Develop documentation of the ESDB processing procedures (80 events per year).

The contractor shall provide technical and professional staff with the specific expertise and knowledge of economic, social, trade and financial data, which is required to perform data selection, formatting and presentation functions for the ESDB data system. The contractor shall manage the Agency's ESDB in accordance with established procedures and shall obtain periodically from new and existing sources, the economic and social data necessary to maintain the ESDB. Successful implementation of this task shall require all contractor staff to become thoroughly familiar with the data contents of the ESDB and with the procedures that have been established to operate and maintain the system. This requires knowledge of the selection criteria and definitions of the economic and social data which are most pertinent to USAID operations, as well as, the expertise and ability to deal on a professional level with their appropriate counterparts inside and outside of the Agency, particularly when attending appropriate information sharing and data exchange meetings, conferences and workshops.

The operation of the ESDB shall also require the Contractor to purchase hardcopy statistical reference materials, subscriptions to external on-line economic and social database services, statistical data on diskettes and CD-ROM statistical data publications. The contractor shall be required to maintain access to external economic and social database resources established through exchange agreements by CDIE/DIO with other international development organizations and U.S. government agencies.

The Contractor shall perform an annual needs assessment of Mission and USAID/W economists to determine which data are the most beneficial to users and how they can improve the collection and dissemination of economic and social data through the computer diskette service and other mechanisms.

C.2.2.d RESPONDING TO ECONOMIC AND SOCIAL DATA REQUESTS

The contractor shall respond to all USAID quantitative data research and analysis requests, which includes assisting USAID staff in the development of socio-economic research methodologies, statistical analysis, and the preparation of special socio-economic data reports. This includes approximately 1,000 quick data and data research inquiries per year and 150 in-depth, analytical requests per year (average 2 days per request).

The contractor shall perform the following research and analysis activities in response to USAID Bureau and Mission requests:

- (1) Provide access to macroeconomic, agricultural, trade, environmental, social, financial and other statistical data (in electronic and printed formats) using USAID-managed databases (ESDB), USAID Intranet resources, external databases (e.g. DAC OnLine, STAT-USA, FAOSTAT, TPIS), non-electronic/published data sources (e.g. IMF Recent Economic Developments, World Bank and USDA country reports), Internet statistical data resources and other non-traditional data sources;
- (2) Perform statistical analysis of socioeconomic data, such as econometric and forecast modeling, to identify current and historical trends and development impacts in developing countries;

- (3) Prepare selected statistical data sets and provide analysis of the data to support bureau analysis and research requirements, for example country rankings in such areas as, food security, poverty, nutrition, and income measurements;
- (4) Produce written socio-economic reports, which contain convincing statistical data research, methodology and analyses supported by time-series, cross-sectional and regional comparisons;
- (5) Create and maintain macro-economic data profiles for USAID-assisted countries containing national account, central government, balance of payment, and financial institution data;
- (6) Provide technical assistance to Agency staff for all ESDB databases in selecting the most appropriate statistical data source and data variable, along with, the most useful format and presentation to convey the analytical result to client's audience;
- (7) Analyze and evaluate the statistical and technical data methodologies of international data sources. Reconcile the analytical use of international data sources with Agency research needs;
- (8) Serve as the Agency focal point in coordinating and harmonizing socio-economic data from a wide and disparate range of data sources, including traditional and non-traditional data sources;
- (9) Provide statistical data and analysis support to PPC's Agency strategic planning, goal review, performance planning and performance reporting activities and publications; and,
- (10) Provide on-going statistical data and analysis support to CDIE/PME's program performance measurement and evaluation program and CDIE/POA's program evaluation and operations assessment initiatives.

Under the direction of the Cognizant Technical Officer (CTO), or his/her designee, the Contractor shall respond to requests for ESDB data from USAID/W offices, the field missions and other eligible clientele, e.g. Congress, and will provide information and guidance as to the validity, timeliness, and appropriate formatting of the data, including graphics, in order to promote its effective use and dissemination. The contractor shall make every effort to provide all responses to statistical data and research requests in a timely manner which is consistent with the scope of the data analysis task and which meets the required deadlines of the end-user client. The successful implementation of this task will require that, in addition to being familiar with the data available through the ESDB, Contractor staff will need to have a sound working knowledge of Agency economic data and formatting requirements in their areas of expertise, and be able to suggest alternative modes of statistical and graphic presentation that will bring out more clearly development trends in aid-recipient countries and indications of the extent to which USAID-provided resources are affecting these trends.

An illustrative list of the type and nature of some of the past technical support and service activities follows:

Periodic requests

- **Conducting statistical analysis.** The PPC/SPG group asked for a ranking of countries for programming of PL 480 Title III assistance funding.
- **Calculating and compiling development indicators.** The staff from the PPC Center for Development Information and Evaluation (CDIE) and PPC/SPG group requested a compilation of print and Internet releases of Country Development Indicator data tables for the Agency's Annual Performance Report.

- **Computing development indicator measures.** The Global Bureau Economic Growth and Agriculture Development (EGAD) Center, requested development of a food affordability index to provide greater depth to the Agency's economic growth performance measures as part of the Agency's GPRA requirements.
- **Preparing briefing materials for TDY teams and international meetings.** Contract staff responded to specific requests from USAID bureaus, offices and field missions for the compilation of statistical briefing materials to be used by teams traveling to the field or by participants at international meetings.
 - (1) The Africa Bureau requested staff to: 1) prepare country profile data on Rwanda for the new mission director to that country; 2) locate and compile democracy data for a field team heading to Nigeria to open up a "transition" assistance program there; and 3) produce a slide show presentation of basic Southern African country development indicators, regional trade trends, and economic assistance flows for briefings during the Southern Africa USAID mission directors conference in South Africa.
 - (2) The LPA Office, which requested staff to create a series of world maps presenting low-income countries between 1965 and 1995 for use in a joint USAID/State Department senior managers "Tidewater Conference" video.
 - (3) The G/HCD higher education division staff requested ESDS staff to prepared briefing tables and graphs to be used by a team traveling to El Salvador.
- **Supporting the analysis of development issues in Africa Bureau programs.**
 - (1) The AFR/SD office asked staff to collect and examine IMF data on trade and capital flows between Africa and Asia as part of an examination of how the impact of the Asian financial crisis is transmitted to Africa region countries.
 - (2) The AFR SD office requested analysts to compile African country external debt statistics from the World Bank for bureau program budget reviews.
 - (3) The AFR Bureau and the AFR Bureau Famine Early Warning System (FEWS) contractor asked for WDI and World Bank data for indicators on the economic costs of environmental disruptions.
- **Researching and evaluating new statistical data sources.** ESDS analysts assist USAID clients in locating and assessing the quality of data needed for developing and measuring assistance strategies. Examples of research to locate new statistical resources include:
 - (1) A request from the ANE/SEA office for locating UN system data for a democracy and governance study on trafficking in women and girls in the Asia and Near East region.
 - (2) A request from an EE Bureau environmental information contractor for assistance in compiling UN and US Commerce Dept. statistics at the seven and nine-digit level on US environmental exports to selected EE countries to develop a performance indicator for use in conducting environmental programs in the region.
 - (3) The GC office, ESDS analysts conducted an inventory of the frequency of release and the currency of the statistical data reported by international organizations and used by the Agency to measure the indicators of USAID program performance.

- (4) The IG office, ESDS provided guidance on the content and use of the World Banks “World Development Indicators” (WDI) statistical database and compiled spreadsheets on development assistance programs in eight USAID countries where an evaluation of GPRA efforts is underway.
- (5) The M Bureau Budget (M/B) Office, asked ESDS analyst for statistics from the IMF on inflation rates for use in calculating adjustments in USAID field mission operating expense budgets.

Statistical compilations

- **“Mack” Report.** PPC/SPG an update for the State Department’s “Mack” report to Congress, a report that contains statistical profiles of 45 developing countries receiving US economic assistance.
- **LAC Data book.** The LAC Bureau requested a 2000 version of the Latin America Region statistical data across all social and economic sectors.

Global Education Database. The Global Bureau Human Development Capacity Center requested the production of a 2000 version of the Global Education Database, which contains historical and yet to be published data from UNESCO.

C.2.2.e DSS DISSEMINATION SERVICES

In conducting this task, the contractor shall, at a minimum, perform the following information dissemination activities:

- (1) Provide USAID missions and USAID/Washington functional and regional bureaus with timely access to updated electronic statistical, country trends and performance indicator data via the USAID Intranet, from the “CDIE OnLine” home page. Where missions or offices lack Internet service, provide these data by e-mail attachment or diskette on request.
- (2) Maintain selected ESDB country and sectoral “Desktop Data” on the “CDIE OnLine” website on the USAID internal corporate web where most commonly used statistical, country trends and performance data on developing countries may be accessed by Agency staff in Washington and in overseas field missions with Intranet and Internet connectivity.
- (3) Maintain selected, pre-cleared and copyright-released, ESDB country development indicator data on the external USAID Internet site for depicting USAID’s progress in USAID-assisted countries in accomplishing Agency goals and objectives.
- (4) Collect, publish and disseminate, on at least an annual basis, statistical data tables that can be downloaded from the USAID web site by Agency users with Internet browsers or e-mail connections. These web-based statistical resources should include but are not limited to Selected Economic and Social Data for Latin America and the Caribbean, the Global Education Database, and the USAID “Green Book”.

C.2.2.f USAID “GREEN BOOK”

In CY 2000, the PPC Bureau accepted transfer of responsibility from the M Bureau Budget Office (M/B) for managing the Agency’s “Overseas Loans and Grants” database and the task of annual reporting of these statistics to the U.S. Congress. The USAID Budget Office has been responsible for overseeing the maintenance of a historical database on US Overseas Loans and Grants financial statistics (including information on assistance from international organizations), which is compiled and updated annually. This database forms the basis for a Statistical Annex to the Annual Development Coordination Committee Report to Congress. The database has value both as a current record of US Obligations and Loan Authorizations and as a historical record of US foreign economic assistance going back to the post World War II Marshall Plan era. It is used extensively by USAID staff and development partners, US government offices and the public.

The contractor shall annually collect financial data on development assistance from the USAID Financial Management Office, from other USG Agencies and from international organizations and then code and add the data to existing database files and check for accuracy and consistency. The contractor shall then produce from the database an annual report to Congress, “The Green Book” as well as other reports requested by the Agency. M/B’s responsibility for “Overseas Loans and Grants” reporting ended with the printing of the 1998 “Green Book” publication in CY 1999.

(Note: The current ESDS contract shall be responsible for data migration of the USAID mainframe data to the SAS WINDOWS NT environment. M/B has provided documentation to ESDS that will assist in migrating the existing database from the USAID mainframe computer to the SAS Windows NT server environment, where it will be maintained by the future DIS development statistics staff. The current ESDS contractor shall migrate the data files from the USAID mainframe computer and design, document and manage a PC-server SAS-based file system to archive, update, extract and report statistics from the database in electronic and print formats. The SAS database access shall be designed by the ESDS contractor to enable Agency users to access and query the Overseas Loans and Grants database directly with their web browsers.)

“GREEN BOOK” DELIVERABLES

- Provide on-going services for: the annual collection and validation of new loan and grant statistics used in annual database updates; and,
- Report these updates in print and electronic formats to the Congress, Agency users and development partners, starting with the 2000 “Green Book” release in CY 2001.
- A database system shall be maintained to enter each year’s data within two months of receipt of the data files from the data source providers.
- The annual Green Book will be ready for printing by March of each year (The 2000 Greenbook shall be printed in March 2001), by which time new data updates will have been requested from reporting agencies and organizations and entered into the database.

“GREEN BOOK” SERVICES**(1) Annual Database Update**

- Collect financial statistics from USAID and USG and international agencies for the period ending in December of the previous year;
- Enter these data into the newly constructed Windows NT Server SAS-based data files; and,
- Code and verify these updated data

(2) Annual Data Dissemination

- Prepare SAS programs for extracting the data into “galley-ready” tables and pages for the annual “Green Book” publication;
- Update the narrative discussion and general notes that accompany the “Green Book” tables;
- Deliver the draft publication to PPC and M/B for review and then to the USAID print shop for publication; and,
- Work with M/B and PPC on a distribution list and arrange mailing of the print copy and the posting of basic summary spreadsheets on the USAID internal web site.

C.2.2.g GLOBAL EDUCATION DATABASE “GED 2000”**Background**

The Human Capacity Development Center in the Global Bureau (G/HCD), in cooperation with PPC Center For Development Information and Evaluation (PPC/CDIE) maintains and updates a Global Education Database (GED) containing an array of statistics related to education in developed and developing countries around the world to help G/HCD achieve its goals of:

- (1) Assessing the status of basic education, skills training and higher education in USAID-assisted countries and regions, comparing the status both over time for specific countries or regions and across countries and regions for relative standing at any given time.
- (2) Providing statistical data as needed to USAID missions and regional bureaus in support of regional and country strategic planning and monitoring, using a variety of media and statistical reporting formats.
- (3) Utilizing such data in G/HCD strategic planning, program oversight, analysis and monitoring, generating additional data as necessary.
- (4) Providing such data in a variety of media and reporting formats for reporting as necessary to a variety of external audiences, including Congressional reporting and reports to counterpart assistance agencies and international organizations.
- (5) Providing technical support and expert advice to missions and other operating entities within USAID on the appropriate use of data, options for acquiring additional data and assessments of the quality of data available to USAID from other sources.

The GED has generated broad interest since its release in early 1998 as a searchable electronic database that could be installed on users computers from diskette or by downloading from the USAID external Internet web site. Given this broad interest in obtaining statistical data in the GED format, the DIS contract (for G/HCD) shall update the GED database with the most current statistics available from UNESCO and expand the database to include related education and literacy data compiled from the former and current USAID Demographic and Health Survey (DHS) contracts. The updated GED Database shall be produced by the contractor in its current format for release on CD-ROM and for downloading from the Internet. Concurrently, the DIS contractor shall convert the up-dated GED data files to a new format, which shall permit the release of a web-enabled version of the GED, as part of the DSS Intranet-based statistical services.

Description of deliverables and tasks

The contractor shall produce an annual release of the computer-based GED that will allow G/HCD, USAID regional and policy bureaus and field missions, USAID partners and other users to have ready access to the most current education and related social and economic statistics. The GED production shall include the following activities and products:

GED Database in CD-ROM and Internet Downloadable versions

- (1) The contractor shall expand the GED data files each year to include the most recent statistics released by UNESCO. This will also include additional DHS data on education and literacy to be provided by G/HCD and its contractors. The contractor shall also: a) compile regional aggregates for a selected number (about 10) of most frequently used GED indicators; and revise and update current indicators as needed.
- (2) The contractor shall upgrade the GED applications software to incorporate new features requested by G/HCD and/or to delete any less effective ones as recommended by feedback to G/HCD from GED users.
- (3) The contractor shall travel to UNESCO (Paris) to obtain the most current still unpublished data and to consult on plans for web-based dissemination of education statistics.
- (4) The contractor shall produce an updated Agency system-compatible version of the annual GED Database and provide it to G/HCD in CD-ROM format and to LPA and M/IRM for installation as a downloadable file from the Education and Training web page on the Agency's Internet web site and the G/HCD web page on the Agency's Intranet, respectively.
- (5) The contractor shall develop, maintain and use a database of mailing and e-mail addresses for annual GED Database distribution and announcements.

Web-enabled Access to Annual GED Database Statistics

- (1) The contractor shall convert the GED Database MSAccess data files into SAS data files (as a component of the USAID ESDB) that can be linked to the G/HCD Intranet home page and to the "Education and Training" USAID Internet home page and accessed using web-based menu driven user prompts from the both the Agency Intranet and Internet.
- (2) The Contractor shall develop web-based applications for the GED Database access and data extraction and will install and test these applications on the USAID Intranet and make them available to M/IRM for installation on the Agency's internal Intranet home page and LPA external Internet home page.
- (3) The contractor shall document how to use the web-enabled GED Database and, on request, train and orient users.

C.2.2.h DEVELOPMENT STATISTICS SERVICE REPORTING

Each social science/economic analyst shall be required to respond to, track and report, through the DIS management information system, Bureau and Mission inquiries for services and follow-up actions.

C.2.2.i SPECIALIZED DEVELOPMENT STATISTICS SERVICE ACTIVITIES (PERFORMANCE BASE)

The contractor shall provide customized research, statistics, analysis, communications, and technical assistance services, as described in sections C.2.2.a through C.2.2.h, for USAID Bureaus/Offices in the Washington, DC area. These specialized Development Statistics Service activities shall be well integrated with the core Development Statistics Service staff and the overall DIS Knowledge Services Team.

BUREAU SOCIAL SCIENCE AND ECONOMIC DATA ANALYSTS

The contractor shall provide customized development statistics services for USAID Bureaus/Offices in the Washington, DC area. These Bureau social science/economic analysts shall identify, access, manipulate, analyze, and transfer data from the ESDB and other timely data sources to (1) update tailored, on-line, country profile statistical and textual economic and social data files for access by Bureau staff, (2) provide detailed review and analysis of changing country economic and social conditions and (3) measure development impact and trends of USAID and other donor assistance programs at worldwide, regional and country levels for USAID recipient countries. This staff shall respond to approximately 2,000 quick data inquiries per year, 750 in-depth analytical inquiries (averaging 1 day each) per year and 500 quantitative research inquiries per year (averaging 4 hours each).

The contractor shall provide social science/economic analysts to support the following USAID/Washington Bureaus/Offices: Asia and Near East (one Mid-level Analyst), Latin America and the Caribbean (one Mid-level Analyst), Europe and Eurasia (one Senior Analyst), and the Global Bureau Center for Economic Growth and Agricultural Development (G/EGAD - two Senior Analysts). (Note: Future additional Bureau social science/economic analysts for Africa, Humanitarian Response Bureau, etc., shall be accommodated through the Additional Services Options described later.)

Some of these Bureau social science/economic analysts shall act as Service Leaders linking Bureau/Office and Mission staff to DIS information services. The analysts shall be responsible for identifying Bureau and Mission staff statistical data needs, identifying data resources, selecting and analyzing appropriate data and preparing the research and analysis results in a tailored response package or summary analysis paper. Each "regional" and "central" Bureau/Office social science/economic analyst shall specialize in regional development and "central" Bureau policy and strategic issues, respectively. Each analyst shall act with a high degree of freedom in designing a statistical research service program which specifically meets their Bureau's/Office's information needs. Each analyst shall be supported by DIS program management, and central DIS research, reference, library, social science/economic analyst, training, outreach, communications, technical support and administrative staff. This staff shall work at the contractor's off-site facility in the Washington, DC area.

The Bureau analyst staff shall also respond to requests and data requirements submitted to them by USAID Central and Regional Bureau senior management, program, project and economist staff. They shall facilitate access to and use of standardized and consistent data sources available through the ESDB, local Bureau resources, Internet and other external statistical databases. On-demand and proactive research and analysis of statistical data shall be performed by this staff to support Bureau and Mission activities such as measuring country development trends, program performance and evaluation monitoring. This staff shall define data collection methodologies, collect and maintain statistical data and produce graphical presentations and analysis of socio-economic data to meet Bureau statistical information and reporting needs. This information shall be made accessible through computer-based information systems, statistical publications and reports and ad-hoc program planning, performance and economic reports.

Each Bureau analyst shall be required to:

- (1) Increase USAID staff awareness of the wide range of information services and products available to them through the DIS contract. The Bureau analyst shall refer requests to DIS staff with sectoral expertise when appropriate. The analyst shall also identify topics worthy of analysis, undertake special research projects, and prepare special reports for the Bureau, as time and request load permit.
- (2) Remain current on USAID programs and trends and priorities in international development and specifically the regional or central thematic area assigned, and shall share relevant information with Bureau and DIS contract colleagues. The Bureau analyst shall develop new mechanisms for sharing this information.
- (3) Develop and maintain contacts with USAID staff and individuals within the development community at large as a key resource person.
- (4) Respond to, track and report, through the DIS management information system, Bureau and Mission inquiries for services and follow-up actions.

The contractor shall provide ESDB economic and social data to computerized central and regional Bureau systems for tracking country development trends. Bureau-level country data profiles shall be updated from traditional ESDB sources, in addition to, expanded hardcopy sources. The Contractor shall provide the professional and technical advisory services essential for establishing requirements to track country development trends and the progress of USAID assistance programs.

The Contractor shall respond to requests for special projects and studies requiring independent data sets and analysis (e.g. econometric modeling) and develop and disseminate special stand-alone products at the request of Bureau staff. For example, data books, working papers, issues papers, trade and investment, economic growth, or environmental analytic studies, and other country profiles with data components, etc.

The Contractor shall respond in a timely manner to requests for ESDB data received from Bureau and Mission staff, and will provide information and guidance as to the validity, timeliness, and appropriate formatting of the data, including graphics, in order to promote its effective use and dissemination. The successful implementation of this task requires that the Contractor: be familiar with the data available through the ESDB; have a sound working knowledge of Agency data and formatting requirements in their areas of expertise; and, be able to suggest alternative modes of statistical and graphic presentation that shall bring out more clearly development trends in aid-recipient countries and indications of the extent to which USAID-provided resources are affecting these trends.

C.3 DIS KNOWLEDGE SHARING TEAM (PERFORMANCE BASE)

The contractor shall plan, develop, implement and periodically assess a comprehensive CDIE/DIO Knowledge Sharing Program to: (1) promote CDIE products, services, resources, and technical assistance support capabilities; (2) communicate country development trends and indicators; (3) communicate development experience, performance and results by USAID and other donors; (4) assist in the establishment of “communities of practice”, and, (5) inform and train USAID and development counterpart staff on the use of development experience, library and social and economic data resources which are becoming increasingly accessible through new and improved information technologies. The contractor shall periodically appraise the need to increase the potential requesters' awareness of clearinghouse, library, research, reference, social and economic analysis, information dissemination and knowledge sharing services. In performing this task, the contractor shall propose (for approval by CDIE/DIO management), develop, and implement feasible methods of outreach, user education, knowledge sharing, communication and promotion to enhance and expand CDIE/DIO's Development Information Service program. The contractor shall provide one Senior Training Specialist/Knowledge Sharing Team Leader, one Mid-Level Web Development Specialist, and one half-time Mid-level Communications Specialist to support DIS knowledge sharing services. The team will coordinate

all DIS contract communications, outreach, training and web development services. The team shall access and use other DIS and DEC contract staff, as appropriate, to implement CDIE/DIO-approved training and outreach programs. It shall coordinate overall DIS contract communication and web development activities with DIS contract communications and web development staff to ensure cost-effective product development and IRM/LPA compliance. The Knowledge Sharing Team shall track and report service activities provided to Bureaus and Missions through the DIS contract management information system. The DEC contractor shall design and integrate comprehensive CDIE websites, such as CDIE Online and other research websites and provide advance technical web development and database support for the DIS contractor.

C.3.1. DIS COMMUNICATIONS AND OUTREACH

In conducting this task, the contractor shall design and produce a variety of communications materials, e.g. videotapes, brochures, flyers, HTML and XML documents and pages. The contractor shall, where appropriate, use the AIDNET (internal Agency email network), CDIE OnLine home page, USAID electronic conferences and listservs, USAID Intranet, Extranet and Internet networks to (1) promote DIS products and services and, (2) increase awareness of and access to USAID and externally-produced development experience, statistical, and literature resources available to primary DIS user audiences. The contractor's use of Agency electronic tool sets and networks for disseminating Agency information, documents and reports to internal USAID staff and external customers shall comply with Agency (IRM and LPA) policies, standards and procedures. New methods for communicating and disseminating these materials shall be reviewed by CDIE for content and overall technical direction and by IRM to determine and plan for the impact on systems, technical staff and structural resources necessary for successful implementation of the proposed approach.

In conducting this task, the contractor shall, at a minimum, perform the following information dissemination activities:

- (1) Prepare a monthly Requests and Responses newsletter (3,000 copies, 50% internal distribution) highlighting sample information services, products and resources provided by the DIS contract during the month to USAID Bureaus, Offices, Missions and partners.
- (2) Prepare a monthly electronic USAID Library New This Month bulletin to USAID staff and partners, which announces newly acquired development publications and resources which are relevant to USAID's current development programs and which are available through the library (also print 200 paper copies for library distribution/use).
- (3) Research, write and produce in-depth issues briefs, research papers, concept papers, etc. (approximately five per year) on development themes, strategies, development experience, performance measurement and indicators, country and sector development trends, development methodologies, development information issues, etc. which are of current interest by USAID and development partner staff.
- (4) Prepare CDIE/DIO and DIS promotional program, service and product brochures, flyers, etc. in hardcopy and electronic form to USAID staff and partners.
- (5) Identify and periodically report new statistical resources -- acquired by the DIS contract on behalf of USAID or available from other sources such as the World Wide Web -- which are relevant to USAID's current development programs.
- (6) Research, write and produce periodic analytical briefs summarizing socio-economic development trends of current interest by USAID and development counterpart staff.
- (7) Develop and maintain summary descriptions of ESDB data which provide, in electronic and hardcopy form, relevant information on all existing and new database acquisitions to the ESDB inventory (on a quarterly basis).

(8) Provide electronic versions of (1) through (7) to CDIE/DIO for dissemination through selected electronic networks such as the AIDNET, CDIE OnLine web site, USAID Development Partners web site, and other USAID Listserv, Intranet, Extranet and Internet services.

(9) Use DEC mailing lists, and where necessary, maintain additional DIS mailing lists for targeting promotional and information dissemination products to CDIE/DIO and DIS user audiences.

(10) Design and produce communications approaches and materials, e.g. briefings, workshops, videotapes, and brochures for promoting CDIE/DIO information services and DIS contract resources, services, products and information centers to CDIE/DIO user audiences.

(11) Develop and implement communications vehicles, e.g. research and statistical publication series, development experience workshops, development dialog brown bags, “communities of practice”, mailing lists, listservs and publications to effectively disseminate development experience information, development approaches, development research findings and results, lessons learned, best practices, and analytical results to targeted USAID and development partner audiences.

(12) The contractor shall also prepare periodic user awareness announcements of new or improved DIS contract resources, products and services, and electronically distribute them to all principle end users via Agency EBBS and/or Agency and DEC contract listservs with CDIE/DIO approval.

In addition, the contractor shall be required to electronically compose and desktop publish, print, reproduce and distribute (using the mailing list above) DIS contract outreach and communication products cited above to USAID staff and development partners. The contractor shall provide communications specialists with desktop publishing experience who can edit and format communications products, publications and reports with imbedded tables, graphics, notes, etc. and who are knowledgeable on all aspects of the use of MS Word, MS Excel, Adobe PageMaker and other current leading desktop publishing software.

C.3.2. DIS TRAINING AND USER EDUCATION

The contractor (in coordination with the DEC contractor) shall provide training services to design and implement a multi-level user training program for the Development Experience System, CD-DEXS (CD-ROM), Economic and Social Data Base (ESDB), USAID Library Integrated Online Library System (IOLS), R4 Database, Non-Presence Country Database, and CDIE OnLine (intranet, extranet and Internet) home page products and services for three different types and levels of USAID and development partner user groups:

- (1) Senior management, policy makers and decision-makers;
- (2) Program analysts, program managers, program officers, activity managers, technical officers, development officers, economists and evaluators; and,
- (3) DIS contract information specialist, librarian, research, social science/economic analyst and other professional staff.

Each of these user groups shall learn how to efficiently access development information resources and systems maintained by the Agency and DIS contract, and related DIS contract products and information services and products which are pertinent to the users development specialization or interest.

The contractor (in coordination with the DEC contractor) shall also provide Internet for Development Practitioner training to USAID staff and partners to facilitate their access and use of CDIE, DIS, USAID Library, Internet, USAID Intranet and Extranet and other institutional, expert, and electronic information and knowledge resources (up to 4 times per year).

USAID Mission and USAID/Washington personnel shall be trained on-site in Agency office or training space.

The training and user education program shall include, but not be limited to, classroom instruction, hands-on training and workshops, development of user manuals and aids, instructional materials, visual aids and course outlines, evaluation of the training programs and follow-up training where necessary. It is estimated that an average of one training course per quarter shall be required. Up to 150 user manuals, 50 operational manuals and 500 quick help guides shall be produced each year by the contractor.

The contractor shall also provide training and technical assistance to USAID Washington staff, USAID Mission staff and their development partners in information center/library management and development communications programs.

C.3.3. DIS CONTRACT STAFF TRAINING

The contractor shall provide training to the DIS contract staff to keep them current on new and changing technology, technical, methodology and analytical skill and knowledge enhancement in the following areas:

(1) Technical Skills

- Computer skills;
- Database search and retrieval skills;
- Electronic network skills, e.g. Internet, Extranet, Listserv;
- Writing skills;
- Document/Text Management software usage (currently Basis);
- Integrated Online Library System software usage (currently SIRSI);
- Statistical analysis software usage (currently SAS);
- Data management and analysis applications development;
- Interview skills; and,
- Communications skills.

(2) Analytical Skills

- Information interviewing/needs assessment;
- Statistical analysis techniques;
- Regression analysis techniques;
- Data collection and analysis methodologies;
- Econometric modeling techniques; and,
- Analysis/synthesis of development materials.

(3) Knowledge Enhancement

- New USAID program strategies and development experience;
- Recent donor experience;
- USAID/donor organizational/program changes;
- PVO/NGO and development partner programs;
- New USAID/donor program strategies and development approaches;
- New economic and social data resources, systems and databases;
- USAID program performance and monitoring methodologies; and,
- U.S. Government Agency international development programs.

The Contractor shall periodically send DIS contract staff to attend workshops and/or conferences, which focus on a particular international development, economic or social issue for developing countries, whose substance will have immediate impact for ongoing DIS support activities. All workshop and conference attendance, which requires travel, per diem or training fees must be cleared in advance by the CDIE/DIO Project Officer.

The contractor shall send selected database administrator and web development specialist staff to attend users group meetings and conferences for application software package used by the contract to maintain ESDB, IOLS and various websites on the USAID Intranet, Extranet and Internet and DIS contract sites at least once a year to learn of new end-user application features and end-user training techniques. Currently SAS Intrnet, SAS PC for Windows and SAS Studio Development Applications is used to maintain ESDB databases and SIRSI UnicornSTILAS Collection Management System is used to maintain the IOLS databases.

C.4. DIS TECHNICAL ASSISTANCE SERVICES AND SPECIAL PROJECTS (PERFORMANCE BASE)

The contractor shall be required to perform technical assistance services, as required, with DIS contract staff (sections C.1. to C.3.) and consultants (section C.6.) on special project activities for USAID Missions, Bureaus and Offices.

The offeror shall be prepared to provide the following technical assistance services in support of USAID Bureaus and Missions, and USAID-funded programs.

- (1) Advising USAID-funded programs and offices on methods for enhancing their ability to acquire, process, organize, disseminate and use development experience, technical and other development information and knowledge effectively and efficiently;
- (2) Providing technical assistance in performing needs assessments and requirements analyses, designing, and operating information centers, libraries and information programs with similar components for USAID activities, missions, offices, USAID-generated or supported information networks, and LDC institution programs and networks supported by USAID;
- (3) Assisting in the design of programs for using communications (written, oral, human, institutional, electronic) as a tool for disseminating and using information and knowledge as a development resource, e.g. information analysis, network development;
- (4) Providing technical assistance in AID/W and overseas USAID project and program evaluation, assessment, strategic planning, program planning, activity design or field research, e.g. survey instrument development, benchmark statistical data and customer surveys, interviewing, research, statistical analysis, data harmonization, review of literature;
- (5) Providing technical assistance in the organization, synthesis, access, dissemination, and use of development experience, statistical data, program and technical information into usable knowledge databases, websites, paper and electronic information products on development activities, program evaluations and assessments, strategic and program plans, and research activities for access, analysis and dissemination to USAID staff and development partners; and,
- (6) Advising USAID-funded programs and offices on methods for collecting, organizing, accessing, processing and using economic and social statistical data effectively and efficiently, and within existing Agency standards and norms for data harmonization.

These services shall be provided by the contractor in USAID/Washington and on tdys to overseas Missions and LDC institutions. The contractor shall consult with IRM on appropriate hardware/software compatibility issues, network addressing concerns and potential Agency corporate system issues when technical assistance services are provided to USAID/Washington offices or USAID Missions which require information technology solutions.

Specific technical assistance assignments shall include participation by DIS contractor staff on evaluation or project design team efforts, in addition to, DIS contractor provision of development and social/economic data research and analysis support for other team members.

With approval of the CDIE/DIO CTO, the Contractor shall provide professional and technical support services, including travel, to meet this demand for DIS activities in the USAID Missions. All TDY travel and technical assistance must be approved in advance by the CDIE/DIO CTO.

C.5. DIS CONTRACT TECHNOLOGY SUPPORT

The contractor staff in sections C.1 through C.3. shall be experienced in designing and managing library and statistical knowledge databases, and intranet, extranet and Internet website resources with the hardware/software toolsets provided by the DIS contract and the Agency's Office of Information Resources Management (M/IRM).

The M/IRM-provided toolsets currently include a SUN Unix Server with Solaris operating system which runs the SIRSI UnicornSTILAS Collection Management System for the DIS contract technical staff to manage the USAID Library and Learning Resource Center IOLS. (Note: The DIS contractor shall provide the SIRSI UnicornSTILAS software upgrades and software support maintenance agreements.) M/IRM also provides a Windows NT server, SAS Intranet, SAS PC for Windows and SAS Studio Applications Development software to the DIS contractor to manage the ESDB and related web site pages. M/IRM shall provide the contractor with sufficient electronic storage capacity to house the various knowledge resources maintained by the DIS contract. M/IRM shall also provide the technology to make these knowledge resources accessible through the Agency intranet, extranet and USAID Internet web sites. (Note: The DEC contractor shall provide a proxy server and firewall for selected public access to the Windows NT server with ESDB which sits inside the Agency firewall.) M/IRM shall provide listserv services for communicating information and sharing knowledge with Agency staff and partners. M/IRM shall maintain adequate system performance and capacity sufficient to support clearinghouse operations and resource requirements. M/IRM shall provide timely solutions, which will quickly resolve system performance issues affecting the efficient operation of clearinghouse activities.

M/IRM staff shall be responsible for the daily operation of servers supporting the ESDB and Library IOLS applications. The DIS contractor shall provide all system administrative support on the servers associated with the SAS and SIRSI software application products.

DIS contract staff will use the IRM toolsets to: (1) define and maintain the USAID Library IOLS catalog and ESDB databases; (2) provide access to electronic files, HTML and XML web pages associated with the Agency intranet, extranet and USAID Internet home page; and, (3) disseminate electronic messages, files and documents through the AIDNET email, electronic conferences and listserv systems.

These applications shall serve to support a part of the Agency's knowledge repository for accessing externally published development literature and country development trend and indicator data. The contractor shall facilitate knowledgebase linkages between these applications, DEC contract applications and other USAID website and information system applications. The contractor's use of Agency electronic tool sets and networks for disseminating Agency and external information, documents, data and reports to internal USAID staff and external customers shall comply with Agency (IRM and LPA) policies, standards and procedures. New methods for communicating and disseminating these materials shall be reviewed by CDIE for content and technical direction and by IRM to determine and plan for the impact on systems, technical staff and structural resources necessary for successful implementation.

At the beginning of this contract, USAID shall provide the contractor with access to existing IOLS and ESDB databases, listservs, CDIE OnLine and other web pages, which are to be maintained by the contractor.

C.6. DIS CONSULTANT SERVICES (PERFORMANCE BASE)

The contractor shall establish institutional arrangements to provide a broad subject spectrum of pre-priced, on-demand, quick-response development research and socio-economic research consultant services (up to 180 consultant days per year) in all USAID strategic goal area to provide expert services and technical support to the Knowledge Services and Knowledge Sharing Teams (Section C.2. and C.3.). These topical consultancy services shall be used to (1) backstop and assist DIS contract staff, when necessary, in research and analysis on specialized development topics and research paper and (2) assist in the design and implementation of special training sessions, workshops and conference proceedings on varying development themes.

The contractor shall also provide pre-priced management support specialist consultant services (up to 20 consultant days per year) to (1) design new DIS contract services and resources, (2) analyze quality, timeliness and cost-effectiveness of DIS operations, products and services, and (3) improve DIS program management, administration, staffing, systems, operations, technologies and outreach activities.

The Contractor shall provide pre-priced technical support specialist consultant services in the areas of knowledge management, development information, strategic planning, activity design and evaluation, data collection and survey design, outreach and training, libraries and information centers and records management (up to 60 consultant days per year) to support sections C.1. through C.4. These consultant services shall be used to (1) provide technical assistance to the DIS contract and USAID Bureaus/Missions to improve Agency library, statistical data and knowledge management/sharing systems and programs, (2) assist in the performance of DIS technical assistance, training, service and outreach activities and (3) provide technical assistance to the DIS contract and USAID Missions to improve library and information center operations, including USAID-funded partner activities.

Contract consultants shall also provide analytical research and data support to a project design or evaluation team; advise on data collection and survey methodology; consult on regional, national or international data and knowledge networks; create a knowledge repository or statistical databank in an LDC; participate on an impact evaluation or design team; or advise Agency strategic task forces and committees.

C.7. DIS CONTRACT PLANNING AND MANAGEMENT (PERFORMANCE BASE)**C.7.1. TRANSITION PLANS TO RELOCATE OLD CDIE/DIO CONTRACTOR FACILITIES**

The contractor shall work closely with the former CDIE/DIO contractors during a transition period to relocate and ensure a smooth startup in the new DIS contractor's off-site facility which will house all DIS contract staff, except where noted otherwise in the scope of work. USAID shall reimburse the DIS contractor for the cost of relocating all equipment, furniture, office files and development materials (housed at the former off-site contractors' facilities in Rosslyn, VA and Washington, DC) during the transition period, and will pay for incumbent contractor costs to train the DIS contractor on current contract operations and procedures.

C.7.2. IMPLEMENTATION PLAN AND SCHEDULE

The contractor shall study the requirements of current CDIE/DIO contracts by appraising present contract operations, information products and user services and familiarizing themselves with M/IRM-supplied and -supported computer operations. The contractor shall also review relevant Agency strategic program directions, plans, evaluations and studies, and by interviewing appropriate USAID staff. (All USAID interviewees shall be cleared by CDIE/DIO prior to the contractor conducting the interviews).

The contractor shall use these requirements to define a one-year implementation plan for the DIS contract presenting a schedule for providing all services, products and functions described in this Statement of Work.

The one-year implementation plan and schedule shall be submitted to CDIE/DIO in draft form for review and approval at the end of the first month of the contract. It shall be revised by the contractor during the next two weeks, with a final version due at the end of the second month. The contractor shall also be required to maintain an updated version of an annual implementation plan throughout the period of the contract.

The plan will provide, at a minimum, the milestones that the contractor proposes for the following activities:

- (1) Identification and improvement of more efficient and cost-effective technologies, procedures, and operations in each area of the contract;
- (2) Design and implementation of an effective management information, user survey and reporting system which will provide the necessary accomplishment and performance information to verify achievement of deliverables under the estimated workload measures and performance targets for this performance-based contract;
- (3) Design and implementation of any proposed database structure and data content changes for library, statistical and management information systems;
- (4) Design and implementation of improved outreach, user awareness, training and user education programs which market, inform and explain the services and products provided by the DIS and DEC contracts to their primary clientele; and,
- (5) A plan for implementing improvements and contributions to the CDIE OnLine and USAID corporate web pages and CDIE contributions to the USAID Intranet, Extranet and Internet Development Partners web sites.

C.7.3. DIS CONTRACT OPERATIONS MANAGEMENT

The contractor will be responsible for establishing effective internal project management direction and controls necessary to:

- (1) Guarantee all requirements of the contract are satisfied in a acceptable time frame;
- (2) Adequately train contract staff in sufficient numbers to perform assigned projects within acceptable time limits and quality control standards for each phase and task of the contract;
- (3) Plan and monitor staff performance of all tasks;
- (4) Anticipate, identify, and resolve problems; and,
- (5) Improve the program efficiency of contract operations.

The contractor will utilize input from the management information systems and customer surveys to improve the effectiveness and efficiency of each task area in the contract.

C.7.4. QUALITY CONTROL

The contractor shall continually perform quality control functions by reviewing the selection of development experience materials, development information and literature, or socio-economic data for the development knowledge and country data trends collection, their relevance and sufficiency to the Agency's strategic program directions and/or the respective service request.

USAID shall monitor the contractor's performance in selecting relevant material and in meeting the specified response times for requestors by reviewing the quarterly performance reports, and holding quarterly and annual management review meetings. The Contractor shall be responsible for preparing appropriate briefing materials for the review meetings to demonstrate the quality level of the library collection and socioeconomic databases. The contractor shall also provide information on the use of knowledge resources by primary audiences, quality of service response packages, and response times and backlogs level for user requests processed by the DIS contract.

C.7.5. DIS CONTRACT OPERATIONS MANUALS

The contractor shall maintain an Operations Manual covering all services and functions to be performed by the contract. All tasks of the contract scope of work will be performed by following the appropriate guidelines specified in the contract Operations Manual. The manual will include, but not be limited to, the following:

- (1) Procedures, guidelines, forms and standards for desktop and electronic publishing, database operations and user services;
- (1) Procedures, guidelines, and standards for library operations, management and processing of development literature into IOLS system;
- (2) Procedures, guidelines, and standards for processing economic and social statistical data from external USG and international sources into central ESDB system;
- (3) Procedures, guidelines, and standards for providing cost effective library, development research and statistical services, including management information system reporting of services provided;
- (4) Standards, procedures, guidelines, and check points for quality control, customer surveys, and service evaluation;
- (5) Procedures and materials developed for outreach, training and user awareness and education functions; and,
- (6) Guidelines and procedures for management review and reporting.

The contractor shall revise, as required, and maintain the Operations Manual throughout the contract. All revised sections will be submitted to PPC/CDIE/DIO for review and approval. The contractor shall use the Agency-approved sections of the Operations Manual as a basis for staff training prior to actual performance of functions in the contract. Copies of the final, up-to-date version of the entire Operations Manual are due at the end of the contract.

In conjunction with the maintenance of the Operations Manual, the contractor shall maintain non-subject authority files such as institutional names, corporate authors, document types, countries, sectors, etc. as required for statistical data, library and development literature processing.

The contractor shall also maintain documentation on ESDB, IOLS and other databases and websites developed and maintained by the contract as part of the Operations Manual.

C.8. DIS CONTRACT AND FACILITIES ADMINISTRATION (PERFORMANCE BASE)

The contractor shall provide one full-time Senior DIS Contract Operations Manager to manage the contractor's off-site facility support and to develop and maintain a unified DIS Contract Management Information System (MIS), with associated time sheet policies.

C.8.1. ADMINSTRATIVE STAFF AND TEMPORARY HELP

The contractor shall provide administrative and temporary help (in sections C.1. through C.3. and section C.8.) to assist with receptionist, secretarial, data entry, processing, filing and administrative duties for DIS contract and facility operations.

C.8.2. MANAGEMENT INFORMATION SYSTEM AND REPORTING

The contractor-provided Management Information System (MIS) shall record and report DIS contract service request summaries, number of events, hours and costs by customer (Bureau/Office), by sector/congressional directive area, by type of service/deliverable, and by strategic objective/activity supported. The type of service/deliverable shall include at a minimum: research requests; data requests; statistical analysis requests; library reference requests; library document and circulation requests; interlibrary loan requests; external commercial online database searches; corporate (intranet), extranet and Internet web user sessions broken down by library, research and economic/social data service websites; and, technical assistance and training requests. Reporting shall also include number of library patrons (by user category), annual library acquisitions and statistical data acquisitions purchases.

The MIS shall be a Commercial Off-The-Shelf software package procured and modified by the contractor to support the DIS contract MIS requirements. The MIS shall provide the required information for CDIE/DIO management semi-annual and annual Bureau/Office Service Cost Accountability Reports which include descriptive summaries of services, time spent and costs broken down by Bureau/Office and type of service for half or all of the fiscal year under review. The MIS will also provide weekly and monthly summary service reports for CDIE and PPC management use, and quarterly summary reports for DIS contract quarterly performance reviews, in addition to, ad hoc reporting requirements identified by CDIE/DIO.

The contractor shall provide computer specialist, hardware and software support for developing and maintaining a Management Information System which records and reports all necessary information for CDIE/DIO management to produce semi-annual and annual Bureau/Office Service Cost Accountability Reports.

The contractor shall retain one copy each of all written, faxed, and emailed correspondence transmitted to requestors. If a request is received as written, faxed or emailed correspondence, a copy of the original request shall be attached to copy of the Contractor's response.

C.8.2.a. ADMINISTRATIVE REPORTS

The Contractor shall submit a weekly electronic narrative report, which summarizes significant DIS contract requests or accomplishments completed during the previous week. This report shall be used by CDIE/DIO to prepare weekly management reports to CDIE and PPC management.

The contractor shall submit a monthly electronic narrative report, which summarizes kudos, and significant accomplishments for the month just completed, and planned activities and accomplishments in the upcoming month.

The contractor shall prepare quarterly performance reports for the first three quarters of the each contract year (see "Inspection and Acceptance" Section E).

The contractor shall submit an annual report (5 copies), which shall summarize the achievements, shortfalls, problems and recommended solutions, evaluation of the contract work to date and proposed plans for the next year of the contract. The annual report shall contain appropriate statistical summaries of each service area of the contract and will include the annual Bureau/Office Service Cost Accountability Report.

All reports shall be submitted to the Project Officer, Development Information Services Contract, Agency for International Development, PPC/CDIE/DIO, Room 6.07-106, RRB, Washington, D.C. 20523-6701.

C.8.2.b. FINANCIAL REPORTS

The contractor will document the expenditure of contract funds for all tasks in a monthly financial management report, which will be due no later than ten (10) workdays after the end of the calendar month. Each report will show expenditure of funds for the reporting period and the amount accumulative to date including the current reporting period. Each report shall account separately for operating expense-funded and program-funded activities. Each report will account for expenditures separately for activities funded by CDIE/DIO and tasks funded by other Agency Bureaus, Offices and Units. The financial report shall break costs down by salaries, library acquisitions, data acquisitions, office space (rent/lease), telephones/telecommunications, training, meeting expenses, travel, printing, reproduction, consultants, administrative costs including temporary help, courier service/postage, computer hardware/software purchase, computer supplies/service, supplies/miscellaneous, subcontract costs, other significant direct-cost line items, fringe, overhead, indirect, G&A costs and fees.

Itemization of expenditure will be defined to the point that:

- (1) Work performed by the contractor and subcontractors on each task along with amount of reimbursement for such work is identified,
- (2) Subcontractors are identified when used, and
- (3) Work performed on each task bears a direct accountability relationship to reimbursement claimed and cumulative funds expended.

C.8.2.c. VOUCHERS

Reimbursement vouchers for all tasks performed under the contract will be submitted monthly.

C.8.3. DIS CONTRACT FACILITIES SUPPORT

The contractor shall relocate R&RS and ESDS incumbent contractor operations located at 1611 N. Kent Street, Rosslyn, VA and 1331 Penn. Ave, Washington, D.C. to its new off-site facility in the Washington, D.C. area facility (preferably within walking distance of the Ronald Reagan Building). The contractor shall relocate library and office equipment, office files, office furniture, telephone systems, computer equipment and systems, mailroom equipment, and telecommunications networks (LAN, Internet and FNS links) to its new facility. The USAID Library and M/HR Learning Resources Center facility and their associated seven library and five research analyst staff located on the Mezzanine level of the USAID Information Center in the Ronald Reagan Building will remain at their current location. The DIS contractor shall pay for all moving and relocation costs.

The contractor shall provide an off-site facility for DIS contract staff, within a 35-mile radius of CDIE/DIO offices at the Ronald Reagan Building in Washington, D.C. for the performance of contract tasks described in this work statement. The facility shall include space for conference/training rooms, the ABIC library, reproduction, office supply, mailroom and computer rooms. The contractor shall provide facility space to initially accommodate approximately 50 contract staff. Additional facility space will be provided by the contractor, as needed, when DIS contract options are exercised to acquire the services of additional DIS contract staff. The facility must be able to meet all Defense Security Service (DSS) requirements specified in section C.12 Security, DD254 (see attachment #10) form specifications and other appropriate DIS contract security clauses (See Section H). The contractor shall pay for facility operations costs including rent, utilities, insurance, and necessary maintenance and repair (if not otherwise covered by the lessee under the lease agreement).

The facility must be capable of providing one-hour priority special delivery of USAID development experience and information materials to USAID offices located at the Ronald Reagan Building in Washington, D.C. It should accommodate all professional and support personnel and equipment at one location.

The facility should accommodate the installation of all government-furnished equipment and furniture, including computer hardware and software, listed in the Furniture, Equipment and Software Inventory section. [See Equipment and Software Inventory attachments in section J]. The Agency shall transfer (and the DIS contractor shall move) the extant inventory of office furniture, library furniture, computer equipment and software, office equipment, Internet ISP addresses, contractor-maintained USAID and non-USAID development materials, and file cabinets from the incumbent CDIE/DIO contractors for use under this DIS contract.

The contractor shall relocate, install and provide (as necessary) all telecommunications and networking equipment including the telephone system with individual telephone handsets, local area network (LAN) hardware, software and peripherals, LAN port hubs and concentrators, LAN printers, and telecommunications services (Internet, FNS, T-1) and links (FNS link to USAID internal computer network and T-1 link to Internet Service Provider) to the new DIS contractor facility. (Note: The contractor will adapt and use existing CDIE/DIO contractor equipment where feasible [See Equipment and Software Inventory attachments in section J]. Any new equipment procurement required must be approved by CDIE/DIO CTO prior to purchase.)

The contractor shall also provide the following facility services including receptionist services, Internet services and support, local area network technical and maintenance support, copier lease and support services, printing services, local and long distance telephone services, a telephone maintenance contract, postage and delivery services, and office supplies for supporting the facility local area network (LAN), LAN printer, telephone, copier and general administrative service needs.

The contractor shall provide one and one-quarter full-time equivalent Computer Specialist staff required to operate and maintain the DIS contract local area network, LAN servers, FNS network routers, telecommunication and linkages, printer servers, workstations, printers, electronic, tape, and optical storage devices, scanning equipment and associated software for local DIS contract services and support system applications.

Computer hardware/software support and computer specialist support shall be provided by the contractor to the DIS contract staff including computer workstation, desktop publishing, CDROM publishing, laser printing, color printing, on-line communication, CDROM reader, hardcopy scanning and reproduction, and other computer equipment used by DIS contractors.

The contractor shall procure the necessary office furniture, file cabinets, shelving and other office equipment required to support the DIS contract staff. The contractor shall also procure the necessary computer workstation replacements, upgrades and software to support the DIS contract staff on the off-site facility LAN and to support the on-site RRB USAID library and research staff and M/HR Learning Resources Center staff. The contractor shall also procure LAN Server hardware/software upgrades and office LAN wiring/hardware upgrades for the off-site facility, as needed, to repair/replace servers, wiring and equipment during their systems life cycle. The contractor shall maximize the use of current CDIE contractor furniture, software and equipment inventory to reduce procurement costs for these items. The contractor shall also provide computer and software support for desktop publishing, on-line communications, CDROM reader, and hardcopy scanning. All furniture, office equipment, software and computer equipment purchases must be approved by the CDIE/DIO CTO in advance prior to purchase.

The contractor shall establish, maintain and complete an annual inventory and maintenance schedule for all government-furnished and contractor-procured, non-expendable furniture, office equipment, computer hardware and software used in supporting Development Information Service contract operations. The contractor shall include, as part of the inventory, recommendations for information technology improvements. The initial inventory list shall be transferred from the incumbent contractor and developed in conjunction with the CDIE/DIO CTO. The contractor shall, as necessary, arrange and provide for equipment maintenance and service call agreements for said equipment (with the exception of Agency-provided equipment located in the USAID Library and M/HR Learning Resources Center photocopying, network, telephone, and microfiche reader/printers which is maintained through separate Agency maintenance contracts).

The Agency shall provide the USAID Library and M/HR Learning Resources Center staff with library furniture and shelving, microfiche reader/printer equipment and shelving, office furniture, telephone, voice mail, local area network (LAN) support, LAN printer support, CD-ROM server access, email, Internet access, and AIDNET access. The contractor shall provide all computer workstations and associated software, supplies and services necessary to support the library staff workstations and contractor-provided equipment. The contractor shall also maintain, and replace if necessary, a CD-ROM tower workstation necessary to operate and access the USAID Library and M/HR Learning Resources Center CD-ROM collection resources.

The Agency shall provide the off-site contract facility with access to the AIDNET, through the contractor-provided communications links, and specific applications located on the AIDNET, contingent on PPC/CDIE and M/IRM approval, and in accordance with M/IRM off-site contractor access policies.

Activities are to be performed on an on-site and off-site basis during USAID's normal working hours, Monday through Friday (excluding holidays), between 8:45 AM and 5:30 PM.

C.9. DIS CONTRACT OPTIONS (LEVEL OF EFFORT)

C.9.1. ADDITIONAL CORE DIS SERVICES OPTION

USAID anticipates an expansion of its DIS contract staff and consultant requirements to service Agency needs during this contract. Additional requirements may result in adding one or more DIS contract staff in the following job categories for a maximum of up to 52,000 additional person hours per year:

JOB CATEGORY

Team Leader
 Bureau/Sector Research Analyst-Senior
 Bureau/Sector Research Analyst-Mid-level
 Bureau/Sector Research Analyst-Junior
 Social Science/Economic Analyst-Senior
 Social Science/Economic Analyst-Mid-level
 Social Science/Economic Analyst-Junior
 Librarian-Senior
 Librarian-Mid-level
 Library Technicians
 Senior Writer/Editor
 Mid-level Writer/Editor
 Senior Communications Specialist
 Mid-level Communications Specialist
 Senior Computer Specialists
 Mid-level Computer Specialists
 Senior Web Dev. Spec./Webmasters
 Mid-level Web Dev. Spec./Webmasters
 Senior Internet Development Advisor
 Mid-level Internet Development Advisor
 Senior Training Specialists
 Mid-level Training Specialists
 Administrative Assistant

Additional requirements may result in adding one or more consultants in the following job categories for a maximum of up to 370 additional consultant days per year:

CONSULTANT CATEGORY

Development/Socio-Economic Research-Senior
 Development/Socio-Economic Research-Mid-level
 Development/Socio-Economic Research-Junior
 Management Support Specialist-Senior
 Management Support Specialist-Mid-level
 Management Support Specialist-Junior
 Technical Support Specialist-Senior
 Technical Support Specialist-Mid-level
 Technical Support Specialist-Junior

Examples of this additional need would include, but not be limited to:

- (1) Additional research analyst and/or web development specialist staff required by a Global Bureau Center to design and prepare a corporate web or Internet home page which organizes and presents the Center's development experience, activities and technical information in an easily accessible and usable format;
- (2) An Agency Bureau/Office requires research analysts, writer/editor or consultant specialists with regional, sectoral or topical specialization (e.g. rule of law) to research, analyze and synthesize USAID development experience materials created by their staff and non-USAID program materials which will become an electronic bibliography on the corporate web linked to paper copy and electronic dissemination of related development materials to a targeted audience;
- (3) A USAID Mission being closed down which requires librarians to review its development experience collection for inclusion in the Agency institutional memory system, central records management system or in-country library repository;

- (4) A USAID Mission evaluating a development activity with an information dissemination component and requires a research analyst or consultant specialist as part of the evaluation team to review the effectiveness of the dissemination program;
- (5) Additional research analyst staff in the Bureaus and specialized information centers needed beyond the present staffing levels, e.g. the LAC Bureau needs a second Bureau research analyst, the Near East Bureau requires a junior-level research analyst to assist one of its two research analysts, the Global Bureau Human Capacity Development Center requires a research analyst specializing in rule of law issues and information resources;
- (6) A research analyst is required where there is currently no on-site analyst, e.g. E&E Bureau, Global Bureau (G), Bureau for Humanitarian Response (BHR), etc.
- (7) A Global Bureau Center wishes to establish a central information unit to provide development information services for primary audiences in its development sector of emphasis, similar to the current G/DG Center Information Unit, and requires a mix of research analyst, social science/economic analyst, writer/editor, and web development specialists to provide central information unit services.
- (8) A Regional Bureau wishes to establish an information unit for providing development information services for primary audiences in its development sectors of emphasis, similar to the Africa Bureau Information Center, and requires a mix of research analyst, social science/economic analyst, writer/editor, and web development specialists to provide these services.
- (9) A Mission requires assistance in designing or assessing a development strategy or activity and requires research analyst, social science/economic analyst or consultant specialist to assist in developing a country strategic framework with performance measures and indicators, a performance monitoring plan, a performance survey instrument, a customer survey, an evaluation methodology, or conducting a user survey or program/activity evaluation.

This contract option shall be exercised as new DIS activity tasks are identified as additional Agency requirements. The hiring of additional DIS contract staff shall be at the same hourly rates as in the base contract. Additional DIS contract staff costs shall also include per person administrative and facility costs, in addition to, any required hardware/software, TDY travel and per diem and other related direct costs (ODCs), etc. The hiring of consultants shall be at the same daily rates as in the base contract. Additional consultant costs shall include the travel and per diem, meeting expenses, and other related ODCs. All costs shall be included in the Additional Core DIS Services Option budget.

The priced-contract option shall be exercised as additional staff and/or consultants are needed by CDIE/DIO to satisfy additional Agency requirements. Only the fixed fee amounts associated with additional staff and ODC costs exercised through this option shall be due the contractor by USAID.

The contractor shall perform these new DIS Services tasks at the same labor rates and fee as those negotiated in the base DIS contract. The associated indirect and other direct costs shall be proposed as actual costs.

C.9.2. AFRICA GLOBAL INFORMATION INFRASTRUCTURE PROJECT - LELAND INITIATIVE OPTION

Phase II - Internet Application Training, Technical Support, Assessments, Case Studies, Best Practices, Evaluation

This DIS contract services option will provide Leland Initiative Support Services for up to five years. This option shall be elected by the Agency in successive one-year periods, with the first one-year option period beginning o/a May 1, 2001. Succeeding Leland Initiative Support Services option periods shall be elected in one-year increments. The Leland Initiative Support Services staff shall be located in the contractor's off-site facility.

BACKGROUND

The USAID Bureau for Africa, through the Leland Initiative, is establishing and expanding Internet connectivity in 21 African countries. Through the previous Research and Reference Services contract the Leland Initiative has completed approximately 15 country assessment/action plans to identify potential Internet applications. This was accompanied by the provision of approximately 15 subsequent technical assistance visits in 8 of these countries to facilitate and encourage the pursuit and development of these candidate applications. A series of reports have been completed detailing the Leland Initiative activities, assessments and technical assistance provided through a series of about 30 two-person TDY trips. Over 25 Internet awareness sessions have been held in 10 of the Leland countries. Special assessment tools, Internet awareness materials, web pages and best practices papers have been designed, developed, and produced, as well as translated into French. The Research and Reference Service contract activity was the primary outreach and communication mechanism for the Leland Initiative.

The Africa Bureau wishes to continue Internet application training, technical support, assessments, case studies, best practices, and evaluation contract support activity for the Leland Initiative, as well as, provide technical support for the more recent Africa Bureau Education Initiative. This contract activity is the primary outreach and communication mechanism for the Leland Initiative.

OBJECTIVE

The objective of this modification is to provide continued technical assistance services for the Africa Bureau Leland and Education Initiatives in up to 21 African countries, including Benin, Botswana, Cote d'Ivoire, Eritrea, Ethiopia, Ghana, Guinea, Guinea Bissau, Kenya, Madagascar, Malawi, Mali, Mozambique, Namibia, Rwanda, Senegal, South Africa, Tanzania, Uganda, Zambia and Zimbabwe to:

- (1) Identify further applications for potential Internet deployment.
- (2) Perform assessments, research, and analysis of ongoing Internet applications.
- (3) Provide in-country Internet training to potential and active Internet application users.
- (4) Perform outreach and communications services to support Leland Internet applications, training initiatives and networking activities.
- (5) Assist in establishing school-to-school partnership networks, between in-country, regional and U.S. primary and secondary schools and universities.

TASKS

The contractor shall complete the following activities in support of the Leland and Education :

- (1) As part of the ongoing Leland TDY activities below, the contractor shall identify additional Internet application opportunities for potential exploration and technical assistance support by the Leland development partners. Promising candidate applications shall be documented through TDY trip reports prepared by the contractor.
- (2) The contractor shall perform up to 6 average intervention assessment/case study toys per year of ongoing Internet applications, performing research and analysis of actual experience in the design, development, use and effect of the application on the organization, networks, customers, users and beneficiaries. The contractor shall document their findings and conclusions in a case study report for each application or group of similar applications, which are investigated and analyzed.

- (3) The contractor shall use the findings of the assessments, case studies, technical assistance training and technical support TDY's to document and report on best practices in Internet application development, deployment and use in different African country development sectors, with an emphasis on education, public/private sector and institution-to-institution networking and information sharing. These best practices, case studies and assessment findings shall be integrated by the contractor into the training TDY intervention materials and workshops.
- (4) The contractor shall provide up to 3 average and 4 full intervention TDY's per year by DIS contract staff to provide training on the application and use of the Internet. This shall include in-country Leland Initiative Internet awareness training workshops to USAID staff and development partners. It shall also include in-country training of trainers workshops to develop a cadre of African trainers who can continue providing future in-country Internet awareness workshops. The contractor shall design, develop, reproduce, distribute, (and translate, when necessary, for Francophone countries) all necessary training materials (workbooks, overheads, etc.) and acquire all necessary training supplies for each workshop participant. Up to 7 in-country training sites, including such things as site and equipment rental, workshop materials, etc. shall be arranged and provided for by the contractor. USAID will arrange, provide for and support the remaining in-country training sites. The contractor shall also provide for up to 30 days local in-country trainer/coordinator consultant staff to assist and support in the planning, coordination and conduct of the training activities. A trip report shall be prepared for each average and full intervention training TDY, citing findings, progress, issues, accomplishments and recommendations for further action.
- (5) The contractor shall also provide technical assistance in Internet application development and support both from Washington and during the training TDY's. The technical assistance provided will be highly selective to those USAID development partners who have identified, or are developing, an application which clearly makes strategic and effective use of the Internet for supporting USAID strategic objective development results. This technical assistance shall include training support using Internet technology such as listservs, specialized training sessions in-country as part of the general training TDY's, and training for USAID-funded development partners sent to Washington. Findings, progress, issues, accomplishments and recommendations for further action in providing technical assistance shall be included by the contractor in the TDY trip report.
- (6) The contractor shall perform outreach and communications services to support Leland Internet applications, training initiatives and networking activities. This shall include web page development and maintenance for the Africa Bureau Leland and Education Initiatives, communicating Leland training and technical assistance activities, posting FAQs, disseminating case study, assessment and best practices findings, sharing Leland training materials, documenting Leland training participation, documenting and linking to Leland training listserv sites. This shall also include the operation and maintenance of Leland listservs. The contractor shall also present occasional papers on Leland activities, best practices and results at up to 5 conferences or workshops in the Washington-area, or in conjunction with a conference associated with one of the average or full intervention TDY's planned above.
- (7) As part of the Africa Education Initiative, the contractor shall assist in establishing school-to-school partnership networks, between in-country, regional and U.S. primary and secondary schools and universities. The contractor as part of the training and assessment TDY's above shall perform outreach activities, which shall identify and promote opportunities for establishing these educational networks and partnership programs between schools and universities. The contractor shall also provide specialized in-country training to African teachers and administrators to provide them with the necessary technical, organizational and management knowledge to foster and nurture the development of effective school-to-school partnership programs. Findings, progress, issues, accomplishments and recommendations for further action in providing technical assistance under the education initiative shall be included in the average or full intervention TDY trip report.

- (8) The contractor shall perform and complete bi-annual assessments of the Internet Training program delivered in up to 20 Leland countries. The contractor shall design the questionnaire, interview training participants, tabulate and analyze all data results. The assessment will address the number of people trained, multiplier effect, the impact on their organizations and institutional networks, and the resulting change in use and application of Internet technologies in these environments.
- (9) The contractor shall provide training of trainers programs to members of critical educational and other African organizations with extensive networks in the Africa region, which will have multiplier effects, such as the Association for Development of Education in Africa (ADEA), an education network of education ministers in African countries.

REPORTS AND DELIVERABLES

The contractor shall provide the following deliverable reports, according to the following schedule:

- (1) Case study and assessment reports are due within one month after completion of the average intervention assessment TDY.
- (2) Best practices materials shall be posted on the Internet as they become available, but at a minimum once every six months.
- (3) Trip reports are due within two weeks after completion of an average or full intervention training or technical assistance TDY.
- (4) An annual report summarizing the status of Leland training and technical assistance activities is due as part of each annual report for the DIS contract.

The contractor shall prepare the following deliverables in time to support the training TDY's.

- (1) 2000 copies of the training manual/workbook/year.
- (1) 400 copies of the training of trainers manual/workbook/year.
- (3) French translations of both training manuals.
- (4) Other training materials, such as overheads, presentation slides, etc.

ROLES AND RESPONSIBILITIES

Technical Direction:

PPC/CDIE/DIO will perform COTR responsibilities for the DIS contract, but the contract staff working in support of the Leland and Education Initiative will receive day-to-day technical guidance during the performance of this special task from the USAID Africa Bureau, Office of Sustainable Development.

In-Country Clearance:

Overall, authority and clearance for activities under this task while overseas shall reside with the USAID mission in that country.

EXPERTISE REQUIRED

The contractor shall provide one full-time Senior Internet for Development Advisor and one full-time Senior Research Analyst professional which have, at a minimum, a Master's Degree and Bachelor's Degree, respectively and 10 and 5 year's experience, respectively, in the information or communications fields.

The contractor staff shall likewise have demonstrated experience in applying communication and information strategies to development issues, as well as, in applying knowledge to a developing country context.

Knowledge of USAID processes, procedures, and policies is desirable.

C.9.3. PPC/PC RESEARCH ANALYST SUPPORT OPTION

This DIS contract services option will provide PPC/PC Research Analyst Support for up to five years. This option shall be elected by the Agency in successive one-year periods, with the first one-year option period beginning o/a May 1, 2001. Succeeding PPC/PC Research Analyst Support option periods shall be elected in one-year increments.

The contractor shall provide one Senior Research Analyst to assist PPC Office of Program Coordination by providing outreach, research, and information support to the reinvention, agency reform, and operations governance efforts directed from the Bureau. This includes working as a core team member of PPC Reinvention, Reform, Change Reference and the OPS Governance teams within USAID. The research analyst will provide research, analysis, writing/editing, web development and maintenance, and communications support. The Research Analyst shall be located at the contractor's off-site facility.

Primary duties consist of but are not limited to:

- (1) Preparing or coordinating timely and accurate responses to requests from USAID staff and development partners which clarify, verify or organize information relating to Agency reform, reinvention governance and change;
- (2) Remaining current on USAID's programs, international development trends, and development information sources. The analyst will share relevant information with USAID and DIS colleagues, and serve as a key resource person in the area of operations governance.
- (3) Responsible for various studies of agency reforms, including the research design, collection, and analysis of data as well as the production, dissemination, and timely presentation of study results in multiple reporting formats. Responsible for active participation in meetings of the Change Reference and other similar Agency groups designed to advise Agency Assistant Administrators on reform action plans;
- (4) Assuming full responsibilities of core team member of the USAID PPC-M Operations Governance Team. Responsible for coordination and analytic support of Team activities and for collecting, maintaining, and disseminating information generated for and by the Team, including assisting with the OPS Governance database. Work to further Agency reengineering agenda in the areas of:
 - (a) Improved Development Assistance Programming;
 - (b) Improved Program Management; and,
 - (c) Improved Operations (OPS) Governance (systems communicating rules and information about Agency operations; and,

(5) Providing technical support and guidance to the PPC communications team by ensuring the accuracy and comprehensiveness of information on various web pages such as OPS Governance, reinvention and reform, and by assisting in the resolution of internal and external PPC web site issues. Responsible for assisting the Agency in disseminating reinvention, reform and OPS Governance materials on the Agency's external web site. Monitor web site issues as they pertain to PPC's role within the Agency.

C.9.4. PPC/PDC RESEARCH ANALYST SUPPORT OPTION

This DIS contract services option will provide PPC/PDC Research Analyst Support for up to five years. This option shall be elected by the Agency in successive one-year periods, with the first one-year option period beginning o/a May 1, 2001. Succeeding PPC/PC Research Analyst Support option periods shall be elected in one-year increments.

The PPC Office of Policy Development and Coordination (PPC/PDC) requires one dedicated Senior Research Analyst to provide on-call capacity for research and reference, and occasional economic and social data analytical services to be applied to short term tasks that would:

- (1) Identify critical state-of-the-art or current hallmark documents/analyses;
- (2) Summarize the most critical points and understandings on a given topic;
- (3) Analyze and summarize data from USAID programs;
- (4) Compare the state-of-the-art with USAID positions, experience or policy;
- (5) Present such information in a succinct and summary form;
- (6) Effectively disseminate the products of items 1-5; and,
- (7) Obtain and correlate feedback on the information disseminated.

The contractor will be required to undertake the above tasks on a variety of different sectoral (e.g., environment, health, democratic governance, economic growth, conflict, humanitarian assistance) or cross-sectoral (e.g., civil society, institutional capacity development, poverty alleviation) topics. The contractor must be able to provide the above services in a very short time period, although not all assignments will require an immediate response. The Research Analyst shall be located in the contractor's off-site facility.

PDC requires contractor services to manage two to three web fora. Illustrative topics for these fora include participation, intersectoral partnering and social science issues in USAID. This entails monitoring the page(s) on the USAID web site devoted to these topics, routinely deleting outdated information, posting new information, responding to e-mail messages and moderating any discussions that are launched. The contractor will be required to respond to information requests that are within the scope of the contract (e.g., for USAID publications).

PDC requires contractor services up to three times a year to systematically elicit information from specific units in USAID (e.g., surveys of field missions and Washington operating units), analyze the information and prepare presentations based on the findings. This task will principally be carried out via electronic or other long-distance means, and will not require extensive overseas travel.

It is expected that the Senior Research Analyst will be designated the principal liaison and principal research analyst for PPC/PDC. The individual's qualifications should include skills in managing a complex work load (i.e., multiple, complex task requests with simultaneous deadlines) as well as research, analysis and writing skills.

C.9.5. LAC HURRICANE RECONSTRUCTION INFORMATION COORDINATOR OPTION

This DIS contract option shall provide a Mid-level Research Analyst for six months during FY 2001-2002 beginning o/a May 1, 2001 to serve as the LAC Bureau Information Coordinator for Hurricane Reconstruction in the Office of Development Planning and Budget (LAC/DPB).

The Research Analyst duties shall include:

- (1) Maintain Hurricane Reconstruction Tracking System (HRTS) and unify HRTS program data and Mission and Inter-Agency Agreement (IAA) financial reporting.
- (2) Help define content, format and collection process of reports. Improve quality control and data collection methods for ongoing monitoring and evaluation as needed and assisting Missions with questions concerning data.
- (3) Identify lessons learned or areas of innovation which should be shared with a broader audience inside and outside USAID.
- (4) Assemble quarterly Mission reports (narrative and financial), compile success stories for use in briefings, memoranda and presentations on an "as needed" basis, respond to requests for information about expenditures and results from Congress, White House, GAO, OMB, USAID partners, and the public.
- (5) Coordinate and publish (internal only) comprehensive quarterly financial reports from seven Missions and IAA contact people.
- (6) Draft LAC Annual Report for U.S. Government Hurricane Reconstruction Response for publication in October 2001, showing progress to date, key achievements and financial data as of 9/30/2001. Coordinate with USAID's in-house printer and with the Agency Webmaster to ensure printing and posting of electronic version to the Agency website. (deliverable).
- (7) The Research Analyst shall also take one 10-day trip to visit several countries in Central America to provide training to hurricane reconstruction data providers on data quality and data reporting improvements.

C.10. PERSONNEL REQUIREMENTS**C.10.1. SKILLS REQUIRED**

The following categories of personnel are required to perform the tasks described in the work statement:

- Project Director
- Operation Managers (Library, ABIC, G/DIU CIU, DIS Contract)
- Team Leaders
- Research Analysts/Research Assistants
- Social Science/Economic Analysts
- Librarians
- Library Technicians
- Writer/Editors
- Communications Specialists
- Computer Specialists
- Web Development Specialists/Webmasters
- Internet Development Advisor
- Training Specialists
- Administrative Assistant
- Temporary Staff

The contractor's personnel must be knowledgeable about the information needs of the development community and about the identification, assessment, selection, and organization of information for development and knowledge management purposes.

The contractor shall provide personnel having skills in database entry, update, search, retrieval and reporting as well as knowledge of the relevant fields and disciplines encountered in development. Equivalent work experience may be substituted for Bachelors, Masters and Doctorate degree requirements specified in each job category.

C.10.1.a. RESEARCH ANALYSTS

Research analysts must have varying levels of advanced degrees or equivalent work experience in International Relations or a related field in international development, with emphasis on economic or development assistance. Familiarity with the organization and operation of USAID is preferred. Previous development experience is desirable. Foreign language capability, especially in French and Spanish, is desirable.

The research analysts proposed and provided by the contractor shall comprise the specified mix of junior level, mid-level and senior-level research analysts in the scope of work. (Equivalent work experience may be substituted for degrees specified below.)

Junior-level analysts (research assistants) shall have as a minimum requirement a Bachelors degree in international affairs or related field, 2 years of office/administrative experience, and 1 year of work experience (through internships or employment) in one of the development sectors in which USAID operates or with an international development organization.

Mid-level analysts shall also have as a minimum requirement a Masters degree in international relations or in another field related to international development, economics or business, 2-3 years of experience in one of the principal development sectors in which USAID operates, and experience in and knowledge of developing countries.

Senior-level analysts shall also have as a minimum requirement a Masters or Doctorate degree in international relations or in another field related to international development, economics or business, a proven track record of publishing papers in a development sector in which USAID operates, 4 or more years of experience in one of the principal development sectors in which USAID operates or a particular region of the developing world.

Researchers shall also be skilled in the following areas:

- Ability to perform research and analysis in a quick-response mode and synthesize research findings.
- Ability to evaluate and select appropriate development materials.
- Ability to interview requestors to better interpret their requirements.
- Demonstrated research writing and communications skills.
- Ability to work effectively both as a team member and individually, and to plan, organize and use time effectively.

Researchers shall also have the following technical knowledge:

- Experience in working with information systems, including on-line database and Internet searching, CD-ROM application searching, and using electronic telecommunications systems.
- Experience and knowledge with using database software (Basis Plus and SIRSI Unicorn STILAS preferred), working knowledge of such commercial/USG database resources as MEDLINE, POPLINE, AGRICOLA, ERIC, INFOSOUTH, DIALOG, NEXIS/LEXIS and OCLC, and experience with using major information search engines through the Internet.
- Experience with personal computing: specifically word processing (MS Word preferred), spreadsheets (MS Excel preferred), databases (MS Access preferred), Internet browsers (Netscape/Explorer preferred), CD-ROMs and email.

The contractor shall propose a research analyst staff that will provide professional services supporting each of the following Agency strategic development goal areas

- Economic Growth/Agricultural Development;
- Democracy and Governance;
- Human Capacity Development;
- Population, Health and Nutrition;
- Environment and Natural Resources; and,
- Humanitarian Assistance

to provide complete development research coverage of all Agency goal areas.

C.10.1.b. SOCIAL SCIENCE/ECONOMIC ANALYSTS

Social Science/Economic Analysts will have varying levels of advanced degrees or equivalent work experience in a social science related to international economic development. Familiarity with the organization and operation of USAID is preferred. Previous international development experience is desirable. Foreign language capability is desirable. The contractor will propose a minimum of one experienced social science/economic analyst (unless otherwise specified) in each of the following geographic regions:

Africa;
Asia and Near East;
Europe and Eurasia; and,
Latin America and the Caribbean.

In addition, the contractor shall propose two (2) experienced social science/economic analysts in the following sectoral area:

Economic growth/Agricultural Development.

The social science/economic analysts must be knowledgeable about the data needs of the international development community and about the identification, assessment, selection, and organization of socio-economic data for development purposes.

The contractor shall provide professional personnel having skills and experience in the use of computer-based software that allows for the management, manipulation and analysis of large statistical databases. Furthermore, this staff shall be skilled in the use of statistical and analytical software packages and quantitative, data analysis methods appropriate to performing research and analysis of the socio-economic situations of developing country economies and trends. Knowledge and skill in the use of personal computer and client-server-based statistical data management and analysis, spreadsheet, word processing, Internet browser and search engine software is required (MS Excel, MS Access, MS Word, SAS PC for Windows, SAS Intrnet, SAS Studio Applications Development, Netscape/Explorer Browsers, and Internet search engine software are preferred).

The social science/economic analysts proposed and provided by the contractor shall comprise the specified mix of junior level, mid-level and senior-level research analysts in the scope of work. (Equivalent work experience may be substituted for degrees specified below.)

Junior-level analysts shall have as a minimum requirement a Bachelors degree in a social science related to international economic development, 2 years of office/administrative experience, and 1 year of work experience (through internships or employment) in one of the development sectors in which USAID operates or with an international development organization.

Mid-level analysts shall also have as a minimum requirement a Masters degree in a social science related to international economic development, 2-3 years of experience in one of the principal development sectors in which USAID operates, and experience in and knowledge of developing countries.

Senior-level analysts shall also have as a minimum requirement a Masters or Doctorate degree in a social science related to international economic development, a proven track record of publishing papers in a development sector in which USAID operates, 4 or more years of experience in one of the principal development sectors in which USAID operates or a particular region of the developing world.

The contractor shall propose a social science/economic analyst staff that will provide professional services supporting each of the following Agency strategic development goal areas

- Economic Growth/Agricultural Development;
- Democracy and Governance;
- Human Capacity Development;
- Population, Health and Nutrition;
- Environment and Natural Resources; and,
- Humanitarian Assistance

to provide complete development statistics coverage of all Agency goal areas.

C.10.1.c. LIBRARIANS/LIBRARY TECHNICIANS

Librarians and catalogers shall have a minimum of an M.L.S. degree or equivalent work experience. A bachelor's degree in a subject relevant to social and economic development or international relations is also preferred. Knowledge of the operation of USAID and other foreign assistance programs is desirable. Previous development work experience is desirable. Knowledge of national/international development materials is mandatory. Two librarian staff shall have experience with AACR2 cataloging, formatting and use of MARC records. Librarians provided by the contractor shall have reference librarian, collection development, on-line commercial database service, inter-library loan, serials control, outreach and acquisitions librarian experience.

Librarians and catalogers shall also be experienced in the following areas:

- Ability to evaluate and select development information materials.
- Experience in interviewing requestors to determine their information requirements.
- Experience on a library reference desk.
- Experience in training patrons in the use of library resources, including CD-ROM and OPAC database applications.
- Experience in database searching of on-line (commercial and Internet) and CD-ROM systems and products using several different Internet search engines and software languages.
- Experience in searching databases on services such as DIALOG, Dun & Bradstreet, InfoSouth, Internet, Nexis/Lexis, etc.
- Experience in using OCLC (Cataloger and ILL technician).
- Experience with personal computer database, spreadsheet, word processing, Internet browser and search engine applications (Windows 95/98, MS Word, MS Access, Netscape/Explorer preferred).
- Familiarity and knowledge of library and text/document management database software (Basis Plus and SIRSI UnicornSTILAS preferred).
- Strong organizational, interpersonal, oral and written communications skills.
- Ability to work effectively as an individual and as part of a team.

Library Technicians shall have a minimum of a Bachelors degree in library science, information science, communications, English, journalism, a related field, or equivalent work experience. Knowledge of international development and foreign assistance programs through education or experience is desirable. Librarians provided by the contractor shall have reference librarian, inter-library loan and acquisitions librarian experience.

Library technicians shall also be skilled in the following areas:

- Ability to evaluate and select development information materials.
- Strong written, proofreading and editing skills.
- Ability to work effectively as an individual and as part of a team.
- Experience with personal computer database, spreadsheet, word processing, Internet browser and search engine applications (Windows 95/98, MS Word, MS Access, Netscape/Explorer preferred).
- Familiarity and knowledge of library and text/document management database software (Basis Plus and SIRSI UnicornSTILAS preferred).
- Excellent organizational and interpersonal skills.

C.10.1.d. WRITER/EDITORS

Writer/Editors must be experienced and skilled in the following areas:

- Bachelors degree in journalism, English, international relations, a related degree or equivalent work experience.
- 3 to 5 years editorial and publications experience.
- Knowledge of desktop publishing (PageMaker preferred).
- Knowledge of electronic Internet publishing (HTML and Adobe Acrobat [PDF] experience preferred).
- Experience with personal computer database, spreadsheet, word processing, Internet browser and search engine applications (Windows 95/98, MS Word, MS Access, and Netscape/Explorer preferred).
- Demonstrated writing, editing, research and analysis skills.
- Knowledge of international development issues and the organization and operation of USAID preferred.

- Knowledge of database software, CD-ROM technology and Internet.
- Foreign language proficiency desired (French, Spanish preferred).
- Ability to work independently and effectively as a member of a team.

C.10.1.e. COMMUNICATIONS SPECIALISTS

Communications Specialists shall have a minimum of a Bachelors degree in library science, information science, communications, English, journalism, a related field, or equivalent work experience. Knowledge of international development and foreign assistance programs through education or experience is desirable.

Communications Specialists shall also be skilled in the following areas:

- Ability to evaluate and select development information materials.
- Strong written, proofreading and editing skills.
- Ability to work effectively as an individual and as part of a team.
- Experience with personal computer database, spreadsheet, word processing, Internet browser and search engine applications (Windows 95/98, MS Word, MS Access, and Netscape/Explorer preferred).
- Familiarity and knowledge of library and text/document management database software (BasisPlus and SIRSI UnicornSTILAS preferred).
- Experience using desktop publishing software (PageMaker preferred).
- Experience with electronic Internet publishing (HTML and Adobe Acrobat [PDF] experience preferred).
- Knowledge of international development issues and the organization and operation of USAID preferred.
- Excellent organizational and interpersonal skills.

C.10.1.f. COMPUTER SPECIALISTS

Computer Specialists must be experienced and skilled in the following areas:

- Bachelor's degree in computer science, information management, information science, related degree or 4 years equivalent experience.
- 2 to 3 years additional experience in personal computer programming and analysis and LAN (Windows NT or Novell) environment development and administration.
- Strong PC-based programming ability and experience using such packages as MS Word, MS Access, MS PowerPoint, MS Excel, Basis Plus, SAS, etc.
- Extensive knowledge and application of a variety of PC software packages, including MS-DOS, Windows 95/98, MS Word, MS Excel, Netscape/Explorer, etc.
- Strong organizational, interpersonal and written communications skills.
- Ability to work independently and effectively as a member of a team.

This staff requires communications skills to train others in computer system applications and use.

C.10.1.g. WEB DEVELOPMENT SPECIALISTS/WEBMASTERS

Web Development Specialists/Webmasters must be experienced and skilled in the following areas:

- Bachelor's degree in international relations, international development, political science, political theory, communications, journalism, English, or a related degree; Master's Degree preferred.
- Two to four years of experience related to electronic communications (Internet) and computerized information services. Experience with Internet website development and management; HTML/web editors; other Internet-related WWW software (e.g. Basis Web Browser, Netscape/Explorer, Cold Fusion, Java, CGI Script); and graphics preparation packages.
- Knowledge of relational, statistical, library, textual and document management database systems (MS Access, Basis Plus, SIRSI UnicornSTILAS and SAS preferred).
- Extensive knowledge and application of a variety of PC software packages, including MS-DOS, Windows 95/98, MS Word, MS Excel, Netscape/Explorer, etc.
- Knowledge of international development with sector/regional specialization.
- Demonstrated writing and editing skills.
- Excellent research and analysis skills.
- Excellent organizational, interpersonal, and problem-solving skills.
- Ability to work effectively both as a team member and independently.

C.10.1.h. INTERNET FOR DEVELOPMENT ADVISOR

Internet for Development Advisors must be experienced and skilled in the following areas:

Candidates for this position must have a minimum of a B.A./B.S. in public administration, finance, business administration, or a development-related field with demonstrated computer, Internet, and project management experience. Candidates with advanced academic degrees or graduate-level experience in the above areas are preferred. Due to the crosscutting nature of this position type which involves interagency and multi-partner (business, university, and NGO) dynamics of the potential interventions that will be defined in regional-, country- and sector-based strategies, s/he should have:

- (1) Three to five years of work experience in international development, project, program, or activity management and knowledge relating to using Internet technology for development;
- (2) At least three years experience in strategic planning, program design, and institutional strengthening;
- (3) Demonstrated experience in applying the benefits of the Internet in a developing country context, as well as a firm grasp of legal and regulatory paradigms that can promote or inhibit effective Internet deployment and applications;
- (4) Ability to articulate a vision of how regional approaches in this area can be designed and managed within USAID and among partners to achieve defined benefits.
- (5) Some language skills for the region involved, e.g. possible French, Spanish, etc. is desirable.

The requirements of this position anticipate a high level of independence in setting out work objectives and defining how best to execute regional, sector and country strategy development processes. The Advisor will also be expected to have extremely effective oral and written communication skills, with an understanding of and appreciation for differing cultural norms.

C.10.1.i. TRAINING SPECIALISTS

Training Specialists must be experienced and skilled in the following areas:

- Masters degree in Education, International Development, Communications, or another field related to the position.
- Demonstrated organizational and logistical abilities. Must be able to plan, organize, and use time effectively.
- Demonstrated written and oral communications skills.
- Demonstrated knowledge of democracy-governance issues (G/DG CIU Only).
- Two to four years experience with precepts of multiple adult learning methodologies and curriculum development techniques.
- Computer skills, including word processing. (MS PowerPoint and MS Access experience preferred.)
- Three years' experience with development of training objectives and facilitation/delivery of training workshops with complex (non-standard) training formats of one- to two-weeks' duration, preferably in topics related to international development.
- Demonstrated experience in planning and conducting events.
- Ability to work effectively both individually and as a member of a team. Ability to manage training teams composed of USAID direct-hire staff with busy schedules and other responsibilities.

C.10.1.j. TEMPORARY STAFF

Temporary staff shall be required to fill-in or supplement part-time or full-time secretaries, administrative assistants and receptionists to provide full-time coverage of DIS contract operations.

C.10.2. CROSS-TRAINING

The contractor shall develop a cross-training program where DIS research, social science/economic analyst and library staff shall be capable of performing and supporting each other's work functions, to respond to changing work load conditions, shifting job priorities and program emphasis, and to backstop short-staffed development information service areas, as required.

The contractor shall also develop a cross-training program where DIS writer/editor, communications specialist and web development specialist professional staff shall be capable of performing and supporting each other's work functions, to respond to changing work load conditions, shifting job priorities and program emphasis, and to backstop short-staffed knowledge sharing services areas, as required.

It is extremely important that the proposed professional staff be "interchangeable" to allow USAID maximum management flexibility to respond to changing information service demands.

C.11. KEY PERSONNEL

The following positions are designated key personnel:

Project Director
 USAID Library Manager/Knowledge Resources Team Leader
 Development Research Service Team Leader
 Development Statistics Service Team Leader
 Knowledge Sharing Team Leader
 DIS Contract Operations Manager

C.11.1. PROJECT DIRECTOR

- Highly-respected, senior executive, development professional with 10-15 years experience in planning, managing, marketing and evaluating development assistance programs (USAID experience preferred).
- 5 - 7 years additional experience in planning, budgeting, and evaluating all aspects of an information service operation.
- Outstanding management and administrative skills.
- Masters degree in information management, information science, international relations or related area.
- Extensive experience in managing a multi-disciplinary team, such as research analysts, social science/economic analysts, librarians, and information specialists, specializing in a broad range of development sectors and regions.
- Extensive experience in development and management of information programs in the public and/or private sector.
- Experience in planning and implementing applications for information management, communication and service delivery.
- Experience in managing technical assistance programs to support information networks, information center and library operations in the U.S. and in developing countries.
- Experience in directing knowledge management programs for use in the U.S. and developing countries.
- Knowledge (and preferably in-depth familiarity) with USAID or other international development programs and policies, particularly as they affect the provision of timely and effective management and dissemination of development experience information and knowledge in developing countries; and,
- Knowledge of information technology and computerized systems, including such technologies as the Internet, CD-ROM, electronic publishing, and local area networking.
- Experience in negotiating and establishing cooperative programs with development organizations for information sharing, networking and donor/development partner coordination.
- Outstanding skills in group presentations and marketing.

C.11.2. USAID LIBRARY MANAGER/KNOWLEDGE RESOURCES TEAM LEADER

- MLS degree from an ALA accredited program.
- 5 to 7 years of experience in providing library and information services.
- 2 years of supervisory experience.
- Experience with development information resources.
- Experience with search and retrieval of on-line, electronic network and CD-ROM, bibliographic, full-text and statistical databases, such as DIALOG, MEDLINE, ERIC, NEXIS, POPLINE, INFOSOUTH, and Internet.
- Experience with OPAC and integrated online library systems.
- Experience with information services in an international development setting or with a development organization preferred.
- Knowledge and familiarity with personal computer and library applications software for supporting library services, library information resource management, and search and retrieval of internal and external databases.
- Experience in training patrons in the use of library resources, including CD-ROM and OPAC database applications.
- Experience in using OCLC.
- Experience with personal computer database, spreadsheet, word processing, Internet browser and search engine applications (Windows 95/98, MS Word, MS Access, Netscape/Explorer preferred).
- Familiarity and knowledge of library and text/document management database software (Basis Plus and SIRSI UnicornSTILAS preferred).

- Knowledge of international development program and organizations.
- Strong oral, written and interpersonal communications skills.
- Strong team building skills.

C.11.3. DEVELOPMENT RESEARCH SERVICE TEAM LEADER

- Doctorate degree preferred in international relations, international development, economic development, social science, or related field.
- 7 to 10 years experience in performing research and analysis in the international development field and with performing functions relevant to the scope of work
- 3 to 5 years of management and supervisory experience.
- 2 years experience with a program or organizations working in international development
- Demonstrated knowledge of use of development information in research and analysis, in addition to, technologies associated with information management and retrieval.
- Demonstrated knowledge of international development issues and trends.
- In-depth knowledge of USAID organization and program portfolio (preferred).
- Demonstrated computer skills.
- Language skills in French or Spanish (preferred).
- Excellent planning and organizational skills.
- Team building skills.

C.11.4. DEVELOPMENT STATISTICS SERVICE TEAM LEADER

- Masters Degree in Social Science (Economics) with a strong emphasis on international development.
- 3 to 5 years of management and supervisory experience.
- 7 to 10 years experience in analyzing or evaluating the economic and social development problems of LDC's and with performing functions relevant to this scope of work.
- Experience in the development and management of data/information service programs in the public and/or private sector.
- Experience in the development, planning, implementation and delivery of data-oriented information services.
- Previous experience with USAID (preferred) and/or other development assistance programs.
- Previous knowledge and experience interfacing and working with multilateral development assistance programs.
- Marketing skills.
- Demonstrated computer skills.
- Excellent planning and organizational skills.
- Team building skills.

C.11.5. KNOWLEDGE SHARING TEAM LEADER

- Masters degree or equivalent years in experience in user education, communications, information science, international relations, or related area;
- 7-10 years additional experience in managing a multi-disciplinary team of communications specialists, web development specialists, training and outreach staff and with performing functions relevant to this scope of work.
- Extensive experience in development and management of information outreach, communications and training programs in the public and/or private sector;
- Previous experience with USAID (preferred) or other development assistance programs.
- Experience in directing research and development programs in information science for use by developing countries;
- Knowledge (and preferably in-depth familiarity) with USAID or other international development programs and policies, particularly as they affect the provision of timely and

- effective management, communication, access and dissemination of development experience information in developing countries; and,
- Knowledge of information technology, telecommunications and computerized systems, including such technologies as the Internet, website development, listservs, electronic conferencing, Internet groupware, and electronic publishing.
- Marketing skills.
- Demonstrated computer skills.
- Excellent planning and organizational skills.
- Team building skills.

C.11.6. DIS CONTRACT OPERATIONS MANAGER

- Bachelors degree in any field (Masters degree desirable).
- 5 or more years of experience in administrative and management positions.
- 3 or more years experience in budget preparation and financial management.
- 3 or more years experience in all aspects of facilities management.
- 2 years experience with USAID-funded projects (preferred).
- 1 to 2 years supervisory experience.
- Knowledge of USAID (preferred) or U.S. government regulations, procedures and contracting requirements.
- Knowledge of information technologies and their applications.
- Knowledge of personal computers, local area networks and automating office and project functions, work flow and management information systems.
- Proficiency in word processing (WordPerfect required), spreadsheet(Lotus 1-2-3 required) applications software.
- Strong organizational and interpersonal communications skills.

Key personnel are considered to be essential to the work being performed under the contract. Prior to making any change or re-assignment in the key personnel, the contractor shall notify the contracting officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the program. The listing of key personnel may, with the consent of the contracting parties, be amended from time to time during the course of the contract to either add or delete personnel, as appropriate.

The contractor shall obtain USAID's approval to change the key personnel, or to continue the work hereunder during a continuous period in excess of three months without the participation of all approved key personnel. The contractor shall consult with USAID if the key personnel plan to, or became aware that he/she shall, devote substantially less effort to the work than anticipated in the Statement of Work. If USAID determines that the reduction of effort would be so substantial as to impair the successful execution of the project, USAID may request a change of key personnel, terminate the project or make any other appropriate modification to the contract.

C.12. SECURITY

C.12.a. SECURITY CLEARANCES

A Secret security clearance is required for all contract personnel who process Agency development experience materials, respond to Agency inquiries, access Agency computer systems or local area networks, or who maintain USAID documents and development information resources. Clearances shall be obtained from the Defense Security Services (DSS) under a Memorandum of Understanding (MOU) with USAID. FAR clause 52.204-2 applies to this contract except that all references to the Department of Defense Industrial Security Manual (ISM) should reference the Department of Defense National Industrial Security Program Operating Manual of January, 1995.

A Secret facility clearance is required for the Development Information Service contractor. This contract will require access to Sensitive but Unclassified (SBU) information. In performing this contract, the contractor will (1) have access to classified information only at a Government activity and (2) perform services only (see Section H.8). Any information pertaining to this contract shall not be released for public dissemination except as provided by the Industrial Security Manual or unless it has been approved for public release by appropriate U.S. Government authority. Proposed public releases shall be submitted for approval prior to release through the USAID, Legislative and Public Affairs Office, LPA/AA, Washington, D.C. 20523.

C.12.b OFF-SITE CONTRACTOR TECHNICAL RESOURCE AND SECURITY REQUIREMENTS FOR ELECTRONIC SBU INFORMATION

The contractor shall provide services from an off-site (non-USAID office space) location and shall require access to the Agency's Internet Gateway and the internal Agency information network (AIDNET). The contractor shall be required to process electronic Sensitive But Unclassified (SBU) information. The following paragraphs stipulate the technical resource and security requirements which shall be provided/met by the contractor to establish the appropriate electronic access links to these Agency information resources.

OFF-SITE TECHNICAL RESOURCE REQUIREMENTS

(a) Applicability. This clause applies when the Contractor's off-USAID-site performance of the contract's statement of work requires connectivity to USAID information technology resources.

(b) Installation, Configuration, and Maintenance Provisions for Network Connectivity.

(1) Internet Connection. When the Contractor requires services supportable via the USAID Internet gateway, the Contractor shall install, configure, and maintain its own separate connection to the Internet. The CTO will ensure that the required USAID information is placed on USAID public systems, and will provide the Contractor with a list of Internet addresses. The Contractor's Internet connection will be restricted to Internet E-mail, Internet access to USAID public systems and, using M/IRM/ISSO-approved hardware and software configurations, access to: (1) the SUN/Unix server for appropriate presentation of DEXS resources; (2) the SUN/Unix server for appropriate presentation of the USAID Library IOLS resources; and, (3) the Windows NT server for appropriate presentation of the ESDS country development indicator resources, via the Internet for USAID's development partners.

(2) AIDNET Connection. When the Contractor requires services that are NOT supportable by an Internet connection, the Contractor shall procure, install, configure and maintain its own separate connection to the non-public USAID network (AIDNET) and other USAID corporate systems through one of the means indicated below. For all cases, no simultaneous connection by the Contractor to any other external systems is allowed.

(i) Via a router, or

(ii) Via a (LAN or PC) dial-up link.

Unless authorized in the contract schedule, the Contractor shall request, through the CTO, that M/IRM and the office with functional authority over the particular corporate system(s) authorize access.

Unless otherwise specified in the contract schedule, USAID information technology support to the Contractor shall be limited to provision of appropriate logon IDs and requisite access to the USAID network (AIDNET) and corporate systems. Access will be limited to the data and systems essential for contract performance.

(c) Security

(1) General Contractor Responsibilities. The Contractor acknowledges that:

(i) The Contractor assumes responsibility for protecting the confidentiality, integrity, and availability of USAID information under its control,

(ii) The Contractor is responsible for restricting access at its site to USAID Information to only authorized users, and

(iii) The Contractor shall adhere to the standards and requirements of USAID Automated Directives system (ADS) Chapter 551, Automated Information Systems Security.

(2) Contractor Clearance and Authorization Levels. USAID will designate and inform the Contractor of appropriate clearance and authorization levels for individuals and facilities.

(3) Specific Technical Security Responsibilities.

(i) All information provided via USAID public systems or exchanged without encryption via the Internet will be strictly non-sensitive in nature.

(ii) When exchanging sensitive but unclassified (SBU) information via Internet facilities, the configuration must include USAID-approved encryption for transmission, as specified in ADS Chapter 551. The Contractor is instructed to contact the Information Systems Security Officer (ISSO) for USAID for site-specific guidance and approval.

(iii) When the Contractor's work requires more than standard functionality, or access requirements beyond the user level, or access to SBU information, and the Contractor requires a connection to AIDNET via a router or dial-up link, then additional security measures may be required by USAID. These measures may include advanced authentication and/or encryption.

(iv) When Contractor personnel have no further anticipated need for access to a particular system, the Contractor shall terminate individual access privileges within one working hour.

(4) Contractor Options for Physical Safeguards When Handling SBU Data in Electronic Form. When the Contractor is required to handle SBU information in electronic form and there is an established need for services beyond E-mail (referred to as enhanced interoperability), then adequate physical security must be established. Any one of the options listed below will be accepted as proof of adequate facility security at the Contractor's site. The USAID ISSO will authorize enhanced interoperability with USAID systems only after implementation of an option.

(i) A facility clearance issue by Defense Security Services (DSS) that covers the facility in which all connected system(s)/terminal(s) are located and includes authorization to store classified data in that facility. Facility clearances are granted by the Defense Security Services (DSS) in accordance with DOD's National Industrial Security Program (NISP).

(ii) A USAID-approved physical security environment, as specified in ADS Chapter 551. The Contractor is instructed to contact the ISSO for USAID for site-specific guidance and approval.

(iii) Use of USAID-approved encryption technology to store SBU data.

In addition, physical access control requirements for the handling of SBU information, in hard copy, as required by 12 FAM 540 and the USAID/General Notice by IG/SEC dated November 9, 1995, must be adhered to by the Contractor.

(d) Change. Changes to the established configuration must be approved by the USAID ISSO prior to implementation to ensure continuity of security measures and to prevent the introduction of new security vulnerabilities.

C.13. DIS CONTRACT EVALUATION

There shall be an evaluation of the Development Information Services contract beginning at the end of the thirty-sixth month after the contract award and as otherwise deemed appropriate by USAID throughout the performance of the contract.

C.14. TECHNICAL DIRECTION

Performance of the work hereunder shall be subject to the technical directions of the USAID Cognizant Technical Officer (CTO) indicated on the Cover Page. As used herein, "Technical Directions" are directions to the contractor which fill in details, suggest possible lines of inquiry, or, otherwise complete the general scope of the work. "Technical Directions" must be within the terms of this contract and shall not change or modify the terms in any way.

SECTION D - PACKAGING AND MARKING**D.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (JUN 1988)**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

I. AID ACQUISITION REGULATION (48 CFR CHAPTER 7) CLAUSES

NUMBER	TITLE	DATE
752.7009	MARKING	JAN 1993

[End of Clause]

D.2 REPORTS

(a) As required by the clause of this contract entitled "Reports" (AIDAR 752.7026), the cover page of all deliverables required hereunder see (Section C. of this contract) shall include the USAID logo (or the name of the Agency written out) prominently displayed, the contract number (see the cover page of this contract), Contractor name, name of the USAID project office (PPC/CDIE), the publication or issuance date of the document, document title, author name(s), project number, and project title. Descriptive information is required whether Contractor-furnished products are submitted in paper or electronic form. All materials shall include the name, organization, address, and telephone/fax/internet number of the person submitting the materials.

(b) Hard copy reports shall be prepared on non-glossy paper (preferably recycled and white or off-white) using black print. Elaborate art work, multicolor printing, and expensive bindings are not to be used. Whenever possible, pages shall be printed on both sides.

(c) Electronic formats shall be submitted with the following descriptive information:

(1) Operating system format, e.g., DOS or Macintosh compatible;

(2) Name of application software used to create the files on the diskette, e.g., Microsoft Word ver. 2.1;

(3) The format for any graphic and/or image files included, e.g., TIFF-compatible; and

(4) Any other necessary information, e.g., special backup or data compression routines/software used for storing/retrieving submitted data.

[END OF SECTION D]

SECTION E - INSPECTION AND ACCEPTANCE**E.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

<http://www.arnet.gov/far>

<http://www.info.usaid.gov>

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

NUMBER	TITLE	DATE
52.246-1	CONTRACTOR INSPECTION REQUIREMENTS	APR 1984
52.246-5	INSPECTION OF SERVICES COST-REIMBURSEMENT	APR 1984
52.246-15	CERTIFICATE OF CONFORMANCE	APR 1984
52.246-16	RESPONSIBILITY FOR SUPPLIES	APR 1984

[End of Clause]

E.2 INSPECTION AND ACCEPTANCE

USAID inspection and acceptance of services, reports and other required deliverables or outputs shall take place at:

Agency for International Development
1300 Pennsylvania Ave., NW
Washington, DC 20523

or at any other location where the services are performed and reports and deliverables or outputs are produced or submitted. The COTR listed in Section G has been delegated authority to inspect and accept all services, reports and required deliverables or outputs.

E.3 RESPONSIBLE OFFICIAL

In accordance with the clauses of this contract entitled, "Inspection of Services - Cost Reimbursement" FAR 52.246-05 and "Limitation of Liability - Services" FAR 52.246-25, inspection and acceptance of all services and supplies required hereunder shall be made only by the Contracting Officer's Technical Representative (CTO) and the Contracting Officer respectively (see Section G of this contract), and not by any official of a USAID Mission or any other USAID office. Inspection and acceptance of services and supplies by the CTO and the Contracting Officer shall form the basis for payments to the Contractor.

E.4 PLACE OF INSPECTION AND ACCEPTANCE

USAID inspection and testing of services and reports and other deliverables required hereunder, if any, shall take place in the Washington, D.C. metropolitan area or at any other location where the services are provided/performed and reports and other deliverables are produced or submitted/delivered. Acceptance of services and reports and other deliverables required hereunder shall take place in the Washington, D.C. metropolitan area or at any other location where the services are provided/performed and reports and other deliverables are produced or submitted/delivered.

E.5 MONITORING AND EVALUATION

CDIE will monitor and evaluate this contract. This will include, but is not limited to the following: detailed assessment of contractor performance, contractor organization and management, field work, etc.; and evaluation of whether the objectives of the contract are being met; whether there is satisfactory progress; if staff members are effective, and to alert the Contractor to any potential problems. The cost of this external evaluation of the contract will be covered by USAID, and will not be charged against the contract.

E.6 PERFORMANCE-BASED MEASURES FOR DEVELOPMENT INFORMATION SERVICES CONTRACT.

The Development Information Services contract is a performance-based contract. A set of performance indicators, outlined below, shall be used by CDIE/DIO to monitor and evaluate the contractor's performance over several different functional areas of the contract. Informal quarterly performance reviews shall be held with the DIS contract management, in which the CDIE/DIO Cognizant Technical Officer (CTO) and the Office of Procurement (M/OP) Contracting Officer (CO) shall review the quarterly performance report/annual report prepared by the DIS contractor. There shall be a 15 day response period for DIS contract management to prepare a follow-up meeting memorandum which documents the following information: summary of performance review discussion, areas of successful and/or poor contract performance, information requirements, contract actions, technical guidance requirements, and specific actions and assignments which must be addressed by contractor, CTO and CO parties, as appropriate. The memorandum will be accepted by the Agency with both CTO and CO signatures. The action items shall be addressed by the action party and the succeeding quarterly performance review, if not earlier, as required to be fully responsive to the identified need.

There shall be an independent external evaluation of the contract funded by USAID, beginning in the 36th month of the contract, which shall rely on much of the performance-based information collected in the areas outlined below. The evaluation, however, shall go beyond performance-based issues and shall address issues related to the most effective development information service approaches to using information as a tool in development to support CDIE/DIO's principal development audiences.

Performance-based measures for the DIS contract are presented in the tables below. Performance-based measures have been defined in the following DIS contract functional areas.

- (1) Knowledge Resources (Section C.1)
- (2) Knowledge Services (Section C.2.1, C2.2, C,4, C.6)
- (3) Knowledge Sharing (Section C.3)
- (4) Management and Administration (Section C.7 and C.8)
- (5) Specialized Information Services Section C.2.1.I and 2.2.i)

The tables are arranged in three columns. The first column defines the performance indicator for the function. The second column defines the data source(s) which shall be used by CDIE/DIO to monitor and review DIS contract performance. The third column defines an acceptable level of contractor performance for the particular performance indicator.

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
* Timely turnaround of requests.	* Client feedback. * Library sign in/out register. * User survey results. * Library web page statistics.	* Same day service.
* Service is effective and facilitates user access to information resources.	* MBWA. * Library sign in/out register. * User survey results. * Library web page statistics.	* Service is courteous and helpful. * Many repeat users. * Users become self-sufficient.
* Library is a key resource for conducting USAID business.	* Client feedback. * Library sign in/out register. * User survey results. * CDIE/DIO acquisitions review and approval. * Library collection circulation data. * Level of client involvement and input in collection development decisions. * Library web page statistics.	* Sustaining or increasing collection use. * Sustaining or increasing Library patronage by USAID staff and Development partners. * Collection relevant and current to USAID's programs.
* Library has an active and effective outreach program.	* Library outreach agenda. * Attendance at open houses, brown-bags, seminars, workshops, etc. * Client feedback and requests for future outreach topics.	* "Brown bags", seminars, open houses, workshops, etc. convened in priority development topics. * Strong patronage by USAID staff. * Additional requests by patrons for future topics.

Knowledge Services – Development Research Service/Development Statistics Service Performance Indicators

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
* Timely turnaround of responses.	* User survey results. * DIS contract MIS data. * Email traffic. * Research and Statistical Service web statistics.	* Initial response 1-2 days after receipt of request (90% of the time).
* Quality of research and analysis.	* User survey results. * Client feedback. * Unsolicited feedback. * Random sampling of clients.	* User receives information which is current, appropriate and responsive to his/her needs.
* Significant and effective development research and data analysis provided by DIS contract research and analysis staff.	* Annual research plan. * Publication dates. * Client feedback. * DIS weekly reports, monthly reports, quarterly performance reports. * User survey results.	* Annual research plan developed, approved by CDIE/DIO and completed on time. * Broad base of Bureau and Mission staff and partner users. * Many repeat users. * Wide range of analysis performed and information needs fulfilled.

* Significant output for research analyst staff.	* Research analyst activity level from DIS contract MIS. * Research paper, trip report, user feedback from training. * DIS quarterly performance reports.	* One significant research paper, training or technical assistance activity per year for each senior research analyst.
* Bureau clientele effectively served.	* User survey results. * Client feedback. * Weekly, monthly DIS contract reports to CDIE/DIO. * Research/Statistics Services web statistics. * DIS contract MIS. * DIS Quarterly performance reports.	* Broad base of Bureau/Mission Staff/Partner users. * Many repeat users. * Wide range of information needs fulfilled.

Knowledge Services – Development Statistics Service - Data Acquisition, Management, and Dissemination Services

Performance Indicators

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
* Existing portfolio of ESDB databases managed and maintained.	* DIS quarterly performance reports. * DSS web site.	* ESDB database update list indicates data continuing to be refreshed on monthly, quarterly or annual basis (depending upon data source schedule).
* New ESDB data management and maintenance strategy developed and implemented.	* DIS quarterly performance reports. * DIS transition plan. * DIS Operations Manual.	* ESDB databases migrate and are maintained on new, more efficient and "user friendly" storage, processing and retrieval platform which is accessible to USAID staff at their desktop.
* New ESDB data sources identified, evaluated and acquired. Also includes acquiring statistical publications in hardcopy.	* DIS quarterly performance reports. * DSS web site.	* New databases and statistical publications added to ESDB portfolio of data resources.
* Development Statistics Service website managed and maintained and ESDB statistical data disseminated on a current and timely basis.	* DIS quarterly performance reports. * DSS and ESDB web site.	* Electronic statistical data acquired are made accessible on DSS and ESDB websites within 30 days of receipt. * Electronic data publications, e.g. Greenbook, completed and posted in compliance with Agency requirements.

Knowledge Sharing Performance Indicators

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
* DIS web pages and communications are current and timely.	<ul style="list-style-type: none"> * Publications produced and distributed. * Publications and communications are posted on CDIE and Agency web pages. * DIS Library, Research and statistics web pages. 	<ul style="list-style-type: none"> * Monthly Requests and Responses issued on schedule 90% of the time. * Library New This Month issued on schedule 90% of the time. * DRS and DSS publications (Greenbook, research reports, etc.) issued on schedule 90% of the time. * Communications content addresses current USAID priority program areas and issues. * Web pages are updated at least once a month and reflect current staff, services and products.
* DIS communications and web pages are extensively used and relevant to USAID staff.	<ul style="list-style-type: none"> * Requests and Responses order forms. * Library circulation statistics. * User survey of Requests and Responses. * DIS web statistics. 	<ul style="list-style-type: none"> * Requests and Responses increases Use of DIS products and services. * New This Month generates increased demand for referenced articles, library web page use and expands usage of Library collection. * DIS contract publications are frequently downloaded and used by USAID staff. * DIS web page use increases by 15% each year.
* DIS training for USAID Staff and Partners.	<ul style="list-style-type: none"> * DIS quarterly performance reports. * Attendance by Agency staff and partners at training sessions. * User feedback from training sessions. 	<ul style="list-style-type: none"> * DIS staff is viewed by Agency staff and partners as a key USAID resource for training on the effective use of Development Information and Knowledge Resources to support Agency programs. * DIS staff is viewed by Agency staff and partners as a key USAID resource for training on the effective use of Internet and related technologies as a tool for supporting Knowledge Sharing and Information Access in support of Agency programs.

Management and Administration Performance Indicators

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
* Responsive MIS to meet CDIE/DIO and DIS contract management and reporting needs.	* Weekly, monthly, quarterly and annual MIS reports.	<ul style="list-style-type: none"> * MIS quarterly and annual reports are available within 30 days after the close of the reported time period. * MIS weekly and monthly reports

		are submitted in compliance with CTO schedule needs. * MIS data provides sufficient detail to account for 95% of DIS staff activity.
* Provide accurate and timely financial accounting data.	*Monthly financial management reports. * Public voucher statements.	* Financial management reports provided within 30 days after completion of previous month's services 95% of the time. * Financial management reports are 100% accurate with final public voucher statements 95% of the time.
* Active DIS network of Regional Bureau, Central Bureau, Global Bureau Centers and Agency Office users of DIS services.	* DIS quarterly performance reports. * CDIE/DIO management contacts with Bureau staff.	* Service leaders establish, maintain and strengthen network of Bureau/Global Center users which is broad-based and active. * Responsive Bureau service by Service Leaders. * New Bureau requirements and activities are identified and supported by DIS Service Leaders and contract staff. * DIS management responsive to Bureau, Center and Office user needs.
* DIS End-user satisfaction.	*Client feedback. * User survey results. * DIS quarterly performance reports. * Unsolicited positive response to work * CDIE/DIO DIS Advisory Board.	* Funding commitments for central services continue. * Service is well received by Agency staff and partner audiences. * Demand for products and services remains strong, grows and/or becomes more sophisticated. * Target audience becomes reliant on service for satisfying critical information needs.
* DIS Staff Training.	* DIS quarterly performance reports. * DIS workshops and seminars.	* DIS staff receives regular training on latest information access and dissemination tools for development information resources. * DIS staff are kept current on recent development trends and issues in Agency priority program areas.

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
* Client Bureau or Mission satisfaction.	* Bureau or Mission buy-ins. Client feedback. * User survey results. * DIS quarterly performance reports. * Unsolicited positive response to work * CDIE/DIO DIS Advisory Board.	*Funding commitments continue. * Service is well received by Bureau or Mission staff and Target audiences. * Demand for products and services remains strong, grows and/or becomes more sophisticated. * Target audience becomes reliant on service for satisfying critical information needs.

[END OF SECTION E]

SECTION F - DELIVERIES OR PERFORMANCE**F.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

<http://www.arnet.gov/far>

<http://www.usaid.gov>

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

NUMBER	TITLE	DATE
52.242-15	STOP-WORK ORDER Alternate I (APR 1984)	AUG 1989
52.242-17	GOVERNMENT DELAY OF WORK	APR 1984

[End of Clause]

F.2 KEY PERSONNEL

The key personnel identified below are considered essential to the work being performed. Unless otherwise agreed to in writing by the Contracting Officer, the Contractor shall be responsible for providing such personnel for performance at the level-of-effort and for the term required. Failure to provide key personnel designated below may be considered nonperformance by the Contractor unless such failure is beyond the control, and through no fault or negligence of the Contractor. The Contractor shall immediately notify the Contracting Officer and the COTR of any Key Personnel's departure and the reasons therefore. The contractor shall take steps to immediately rectify this situation and shall propose a substitute candidate for each vacated position along with a budget impact statement in sufficient detail to permit evaluation of the impact on the program. No replacement of personnel shall be made by the Contractor without the written consent of the Contracting Officer whether provided in advance or by ratification.

The following positions are designated key personnel:

- Project Director
- USAID Library Manager/Knowledge Resources Team Leader
- Development Research Service Team Leader
- Development Statistics Service Team Leader
- Knowledge Sharing Team Leader
- DIS Contract Operations Manager

[End of Clause]

F.3 PERIOD OF PERFORMANCE

The effective date of this Contract is the date of signature by the Contracting Officer on the Cover Page of the Contract, and the estimated completion date is five (5) years Sixty (60) months thereafter.

[END OF SECTION F]

SECTION G - CONTRACT ADMINISTRATION DATA**G.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

<http://www.arnet.gov/far>

<http://www.info.usaid.gov>

FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES AND AID ACQUISITION REGULATION (48 CFR CHAPTER 7) CLAUSES

NUMBER	TITLE	DATE
752.7003	DOCUMENTATION FOR PAYMENT	NOVEMBER 1998

[End of Clause]

G.2 ADMINISTRATIVE CONTRACTING OFFICE

The Administrative Contracting Office is:

Michael Gushue, M/OP/B/AEP
Agency for International Development
1300 Pennsylvania Ave., NW
Washington, DC 20523

Telephone: 202-712-5831

[End of Clause]

G.3 COGNIZANT TECHNICAL OFFICER (CTO)

The Cognizant Technical Officer is _____ or his or her designee at:

Agency for International Development
1300 Pennsylvania Ave., NW
Washington, DC 20523

Telephone:

[End of Clause]

G.4 TECHNICAL DIRECTIONS/RELATIONSHIP WITH USAID

(a) Technical Directions is defined to include:

- (1) Written directions to the Contractor which fill in details, suggest possible lines of inquiry, or otherwise facilitate completion of work;
- (2) Provision of written information to the Contractor which assists in the interpretation of drawings, specifications, or technical portions of the work statement;
- (3) Review and, where required, provide written approval of technical reports, drawings, specifications, or technical information to be delivered.

Technical directions must be in writing, and must be within the scope of the work as detailed in Section C

(b) The CTO is authorized by designation to take any or all action with respect to the following which could lawfully be taken by the Contracting Officer, except any action specifically prohibited by the terms of this Contract:

- (1) Assure that the Contractor performs the technical requirements of the contract in accordance with the contract terms, conditions, and specifications.
- (2) Perform or cause to be performed, inspections necessary in connection with a) above and require the Contractor to correct all deficiencies; perform acceptance for the Government.
- (3) Maintain all liaison and direct communications with the Contractor. Written communications with the Contractor and documents shall be signed as "Cognizant Technical Officer" with a copy furnished to the Contracting Officer.
- (4) Issue written interpretations of technical requirements of Government drawings, designs, and specifications.
- (5) Monitor the Contractor's production or performance progress and notify the Contractor in writing of deficiencies observed during surveillance, and direct appropriate action to effect correction. Record and report to the Contracting Officer incidents of faulty or nonconforming work, delays or problems.
- (6) Obtain necessary security clearance and appropriate identification if access to Government facilities is required. If to be provided, ensure that Government furnished property is available when required.

LIMITATIONS: The CTO is not empowered to award, agree to, or sign any contract (including delivery or purchase orders) or modifications thereto, or in any way to obligate the payment of money by the Government. The CTO may not take any action which may impact on the contract schedule, funds, scope or rate of utilization of LOE. All contractual agreements, commitments, or modifications which involve prices, quantities, quality, schedules shall be made only by the Contracting Officer.

(c) The CTO is required to meet quarterly with the Contractor and the Contracting Officer concerning performance of items delivered under this contract and any other administration or technical issues.

Telephonic reports may be made if no problems are being experienced. Problem areas should be brought to the immediate attention of the Contracting Officer.

(d) In the absence of the designated CTO, the CTO may designate someone to serve as CTO in their place. However, such action to direct an individual to act in the CTO's stead shall immediately be communicated to the Contractor and the Contracting Officer.

(e) Contractual Problems - Contractual problems, of any nature, that may arise during the life of the contract must be handled in conformance with specific public laws and regulations (i.e. Federal Acquisition Regulation and Agency for International Development Acquisition Regulation). The Contractor and the CTO shall bring all contracting problems to the immediate attention of the Contracting Officer. Only the Contracting Officer is authorized to formally resolve such problems. The Contracting Officer will be responsible for resolving legal issues, determining contract scope and interpreting contract terms and conditions. The Contracting Officer is the sole authority authorized to approve changes in any of the requirements under this contract. Notwithstanding any clause contained elsewhere in this contract, the said authority remains solely with the Contracting Officer. These changes include, but will not be limited to the following areas: scope of work, price, quantity, technical specifications, delivery schedules, and contract terms and conditions. In the event the Contractor effects any changes at the direction of any other person other than the Contracting Officer, the change will be considered to have been made without authority.

(f) Failure by the Contractor to report to the Administrative Contracting Office, any action by the Government considered to a change, within the specified number of days contained in FAR 52.243-7 (Notification of Changes), waives the Contractor's right to any claims for equitable adjustments.

[End of Clause]

G.5 752.242-70 PERIODIC PROGRESS REPORTS (JUL 1998)

(a) The contractor shall prepare and submit progress reports as specified in the Schedule of this contract. These reports are separate from the interim and final performance evaluation reports prepared by USAID in accordance with (48 CFR) FAR 42.15 and internal Agency procedures, but they may be used by USAID personnel or their authorized representatives when evaluating the contractor's performance.

(b) During any delay in furnishing a progress report required under this contract, the contracting officer may withhold from payment an amount not to exceed US \$25,000 (or local currency equivalent) or 5 percent of the amount of this contract, whichever is less, until such time as the contracting officer determines that the delay no longer has a detrimental effect on the Government's ability to monitor the contractor's progress.

G.6 REPORTS AND DELIVERABLES OR OUTPUTS

In addition to the requirements set forth for submission of reports in Sections I and J and in the AIDAR clause 752.7026, Reports, the Contractor shall submit the deliverables or outputs specified in Attachment to the COTR specified in Section C.

[End of Clause]

G.7 PAYING OFFICE

The paying office for this contract is:

USAID-M/FE/CMP
RRB Room 7.07 Document Control
1300 Pennsylvania Ave., NW
Washington, DC 20523

[End of Clause]

G.8 ACCOUNTING AND APPROPRIATION DATA

[TO BE COMPLETED AT TIME OF AWARD]

G.9 COMPLIANCE WITH VETERANS EMPLOYMENT REPORTING REQUIREMENTS

(a) The Offeror represents that, if it is subject to the reporting requirements of 38 U.S.C. 4212(d) (i.e. the VETS-100 report required by the Federal Acquisition Regulation clause 52.222-37, Employment Reports on Disabled Veterans and Veterans of the Vietnam Era), it has ☐ has not ☐ submitted the most recent report required by 38 U.S.C. 4212(d).

(b) An Offeror who checks “has not” may not be awarded a contract until the required reports are filed. (31 U.S.C. 1354)

G.10 CONTRACTOR’S PRIMARY POINT OF CONTACT

The Contractor’s primary point of contact for this contract is:

_____ (Name, print)

_____ (Title)

_____ (Address-Line 1)

_____ (Address-Line 2)

_____ (Address-Line 3)

_____ (Address-Line 4)

_____ (Telephone #)

_____ (e-mail address)

This person is an employee of the contractor.

G.11 CONTRACTOR'S PAYMENT ADDRESS

Payment shall be made to the Contractor either by electronic funds transfer or by check to the address shown on the cover page of this contract, unless otherwise indicated below:

_____(Address-Line 1)

_____(Address-Line 2)

_____(Address-Line 3)

_____(Address-Line 4)

[END OF SECTION G]

SECTION H - SPECIAL CONTRACT REQUIREMENTS**H.1 AUTHORIZED GEOGRAPHIC CODE**

The authorized geographic code for procurement of goods and services under this contract is 000.

[End of Clause]

H.2 LOGISTIC SUPPORT

The Contractor shall be responsible for furnishing all logistic support in the United States and overseas.

[End of Clause]

H.3 SUBCONTRACTING PLAN AND THE SF 294 - SUBCONTRACTING REPORT FOR INDIVIDUAL CONTRACTS AND SF 295 - SUMMARY CONTRACTING REPORT

The Contractor's subcontracting plan-dated _____ is hereby incorporated as a material part of this contract. See also FAR Clause 52.219-16 LIQUIDATED DAMAGES - SUBCONTRACTING PLAN (AUG 1988) (incorporated by reference).

"Subcontract" means any agreement (other than one involving an employer -employee relationship) entered into a Federal Government prime Contractor or subcontractor calling for supplies or services required for performance of the contract or subcontract.

For purposes of this requirement, the subcontracting goal is applied to the contract as a whole

In accordance with FAR 52.219-9, SF 294 and SF 295 should be forwarded to the following address:

U.S. Agency for International Development
Office of Small and Disadvantaged Business
Utilization
RRB 7.08-110
1300 Pennsylvania Avenue NW
Washington, D.C. 20523

H.4 INSURANCE AND SERVICES

(a) Pursuant to AIDAR 752.228-3 Worker's Compensation Insurance (Defense Base Act); USAID's DBA insurance carrier is:

Obtaining DBA coverage Applications for coverage should be made directly to:

Rutherford International, Inc.
5500 Cherokee Avenue, Suite 300
Alexandria, VA 22312
Points of Contact: Sara Payne or Diane Ford
(703) 354-1616

Hours of Operation are: 8 a.m. to 5 p.m. (Eastern Standard Time) Telefax: (703) 354-0370 E-Mail:
www.rutherfordord.com.

Applications may be requested by telephone or facsimile and Coverage will be effective on date listed on the Application form as the "coverage effective date" the dated the individual leaves the United States Applicants should request coverage in accordance with USAID Contract No. HNE-Q-00-98-00163-00 with Fidelity and Casualty of New York. Rutherford International, Inc., the agent for Fidelity and Casualty of New York, will require a fax copy of Attachment 1, Application for Defense Base Act Coverage.

(b) Pursuant to AIDAR 752.228-70 Medical Evacuation (MEDEVAC) Services, USAID's Medevac service provider is:

Applications for coverage should be made directly to MEDEX.

Applications may be requested by writing to

MEDEX Assistance Corporation
P.O. Box 10623
Baltimore, MD 21285-0623

Calling toll-free: (800) 537-2029 or in Maryland: (410) 296-2530; and by telefaxing: (410) 321-9779. Applications may be taken by telephone or facsimile and coverage can be effective the same day. Applicants should request coverage in accordance with USAID Contract No. HNE-Q-00-98-00106-00 with MEDEX. MEDEX will require the employee's name, name of dependents, dates of travel, and destination (for short term coverage), and the applicable USAID contract number under which the employee is working.

Upon receipt of the completed enrollment form with the appropriate premium, the contractor will be provided a certificate of coverage and an identification card. The I.D card contains the MEDEX assistance access numbers worldwide and all instructions necessary to gain immediate assistance in the event of an emergency. Emergency calls should be placed to the nearest MEDEX Center or collect to Baltimore, MD, (410) 321-4426, or Brighton, England, [44] 273-202141.

Medevac services costs are allowable as a direct cost.

H.5 BUSINESS & PREMIUM CLASS POLICY

a. This section supplements AIDAR Clause 752.7002 TRAVEL AND TRANSPORTATION (JAN 1990). The intent of this section is to apply the same travel principles to Contractor employees and consultants as those which apply to USAID employees, as delineated in USAID General Notice "USAID Business Class Travel Policy" dated 07/26/98.

b. Normally, Business or Premium Class travel, in excess of the cost of Coach travel, shall not be considered an allowable cost unless the Contractor can demonstrate that the cost of any allowable en route stopover exceed the cost of Business Class.

H.6 POST-AWARD CONFERENCE

USAID may require the Contractor to attend a Post-Award Orientation Conference in person, in accordance with FAR 42.5.

H.7 SMALL DISADVANTAGED BUSINESS (SDB) PARTICIPATION TARGET (Contractor fill-in)

The Contractor's SDB Participation Target (as provided in response to FAR Provision 52.219-24 in Section L of RFP) is:

a. For Prime

In Dollars _____

As a Percentage of total contract value _____

b. For Subcontractors (if participating):

In Dollars _____

As a Percentage of total contract value _____

Target provided must be consistent will Small Disadvantage and Women-Owned Business Subcontracting Plan required in Clause L.5.

H.8 SECURITY REQUIREMENTS

- (a) This contract is designated as a classified contract in accordance with ADS Chapter 567 “Classified Contract Security and Contractor Personnel Security Program” and FAR Subpart 4.4 “Safeguarding Classified Information Within Industry.” As such, it is subject to the requirements of these regulations and the security classification specifications contained in the DD Form 254 attached to this contract in Section J.
- (b) The contractor must maintain a “Facility Clearance” at the level indicated on the attached DD Form 254 (See attachment #1).
- (c) Employees of the Contractor working under this contract and requiring access to classified national security information and/or to areas under the control of USAID deemed “Restricted” by USAID’s Office of Security must have been subject to an appropriate level background investigation by the Defense Security Service (DSS). DSS must issue an “Interim/Final security clearance” for each such employee before USAID will grant him or her unescorted access to USAID’s restricted space(s) or permit him or her access to national security information.
- (d) The contractor’s Facility Security Officer (FSO) must forward a valid “Visit Request” identifying their representative/employees and the required security clearance information to the USAID Office of Security, 1300 Pennsylvania Avenue, N.W., Washington, D.C. 20523-8800.
- (e) In the event the contractor subcontractors any work to be performed under this classified contract, the contractor is responsible issuing the security guidance provided by USAID to any subcontractor and ensuring that subcontractors comply with security requirements of the prime contract.
- (f) The Office of Security will issue RRB facility passes to individual contractor representative/employees upon receipt of the “Visit Request.” The Contractor must ensure that any passes issued are returned upon termination of employee or completion of the contract, whichever occurs first.

Section J, includes J.3. The attached DD 254 “Department of Defense Contract Security Classification Specification”, including the attached supplemental Security Guidance for Item 13, is incorporated into this contract.

52.204-2 Security Requirements (Aug 1996)

- (a) This clause applies to the extent that this contract involves access to information classified “Confidential,” “Secret,” or “Top Secret.”
- (b) The Contractor shall comply with—

(1) The Security Agreement (DD Form 441), including the National Industrial Security Program Operating Manual (DOD 5220.22-M); and

(2) Any revisions to that manual, notice of which has been furnished to the Contractor.

(c) If, subsequent to the date of this contract, the security classification or security requirements under this contract are changed by the Government and if the changes cause an increase or decrease in security costs or otherwise affect any other term or condition of this contract, the contract shall be subject to an equitable adjustment as if the changes were directed under the Changes clause of this contract.

(d) The Contractor agrees to insert terms that conform substantially to the language of this clause, including this paragraph (d) but excluding any reference to the Changes clause of this contract, in all subcontracts under this contract that involve access to classified information.

(End of clause)

PART II - CONTRACT CLAUSES**SECTION I - CONTRACT CLAUSES****I.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

<http://www.arnet.gov/far>

<http://www.info.usaid.gov>

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

NUMBER	TITLE	DATE
52.202-1	DEFINITIONS	OCT 1995
52.203-3	GRATUITIES	APR 1984
52.203-5	COVENANT AGAINST CONTINGENT FEES	APR 1984
52.203-6	RESTRICTIONS ON SUBCONTRACTOR SALES TO THE GOVERNMENT	JUL 1995
52.203-7	ANTI-KICKBACK PROCEDURES	JUL 1995
52.208-8	CANCELLATION, RESCISSION AND RECOVERY OF FUNDS FOR ILLEGAL OR IMPROPER ACTIVITY	JAN 1997
52.203-10	PRICE OR FEE ADJUSTMENT FOR ILLEGAL OR IMPROPER ACTIVITY	JAN 1996
52.203-12	LIMITATION ON PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS	JUN 1997
52.204-4	PRINTING/COPYING DOUBLE-SIDED ON RECYCLED PAPER	JUN 1996
52.209-6	PROTECTING THE GOVERNMENT'S INTEREST WHEN SUBCONTRACTING WITH CONTRACTORS DEBARRED, SUSPENDED, OR PROPOSED FOR DEBARMENT	JUL 1995
52.211-5	MATERIAL REQUIREMENTS	OCT 1997
52.212-4	CONTRACT TERMS AND CONDITIONS-- COMMERCIAL ITEMS	MAY 1999
52.214-34	SUBMISSION OF OFFERS IN THE ENGLISH LANGUAGE	APR 1991
52.214-35	SUBMISSION OF OFFERS IN U.S. CURRENCY	APR 1991
52.215-2	AUDIT AND RECORDS—NEGOTIATION	JUN 1999
52.215-8	ORDER OF PRECEDENCE—UNIFORM CONTRACT FORMAT	OCT 1997
52.215-10	PRICE REDUCTION FOR DEFECTIVE COST OR PRICING DATA	OCT 1997
52.215-12	SUBCONTRACTOR COST OR PRICING DATA	OCT 1997
52.215-13	SUBCONTRACTOR COST OR PRICING DATA--MODIFICATIONS	OCT 1997
52.215-15	PENSION ADJUSTMENTS AND ASSET REVERSIONS	DEC 1998
52.215-18	REVERSION OR ADJUSTMENT OF PLANS FOR POSTRETIREMENT BENEFITS (PRB)	OCT 1997

	OTHER THAN PENSIONS	
52.215-19	NOTIFICATION OF OWNERSHIP CHANGES	OCT 1997
52.216-7	ALLOWABLE COST AND PAYMENT	APR 1998
52.216-8	FIXED FEE	MAR 1997
52.217-2	CANCELLATION UNDER MULTIYEAR CONTRACTS	OCT 1997
52.217-8	OPTION TO EXTEND SERVICES	NOV 1999
52.217-9	OPTION TO EXTEND THE TERM OF THE CONTRACT	MAR 2000
52.219-1	SMALL BUSINESS PROGRAM REPRESENTATIONS Alternate I (OCT 1998) Alternate II (JAN 1999)	MAY 1999
52.219-5	VERY SMALL BUSINESS SET-ASIDE Alternate I (MAR 1999)	MAR 1999
52.219-7	NOTICE OF PARTIAL SMALL BUSINESS SET-ASIDE	JUL 1996
52.219-8	UTILIZATION OF SMALL BUSINESS CONCERNS	OCT 1999
52.219-9	SMALL BUSINESS SUBCONTRACTING PLAN	OCT 1999
52.219-14	LIMITATIONS ON SUBCONTRACTING	DEC 1996
52.219-25	SMALL DISADVANTAGED BUSINESS PARTICIPATION PROGRAM--DISADVANTAGED STATUS AND REPORTING	OCT 1999
52.222-1	NOTICE TO THE GOVERNMENT OF LABOR DISPUTES	FEB 1997
52.222-4	CONTRACT WORK HOURS AND SAFETY STANDARDS ACT--OVERTIME COMPENSATION	JUL 1995
52.222-21	PROHIBITION OF SEGREGATED FACILITIES	FEB 1999
52.222-24	AFFIRMATIVE ACTION COMPLIANCE	APR 1984
52.222-26	EQUAL OPPORTUNITY	FEB 1999
52.222-29	NOTIFICATION OF VISA DENIAL	FEB 1999
52.222-35	AFFIRMATIVE ACTION FOR DISABLED VETERANS AND VETERANS OF THE VIETNAM ERA	APR 1998
52.222-36	AFFIRMATIVE ACTION FOR WORKERS WITH DISABILITIES	JUN 1998
52.222-37	EMPLOYMENT REPORTS ON DISABLED VETERANS AND VETERANS OF THE VIETNAM ERA	JAN 1999
52.223-5	POLLUTION PREVENTION AND RIGHT-TO-KNOW INFORMATION	APR 1998
52.225-3	BUY AMERICAN ACT--NORTH AMERICAN FREE TRADE AGREEMENT--ISRAELI TRADE ACT--BALANCE OF PAYMENTS PROGRAM	FEB 2000
52.223-6	DRUG-FREE WORKPLACE	JAN 1997
52.225-10	DUTY-FREE ENTRY	APR 1984
52.225-70	SOURCE, ORIGIN AND NATIONALITY REQUIREMENTS	FEB 1997
52.227-2	NOTICE AND ASSISTANCE REGARDING PATENT AND COPYRIGHT INFRINGEMENT	AUG 1996
52.227-10	FILING OF PATENT APPLICATIONS CLASSIFIED SUBJECT MATTER	APR 1984
52.227-14	RIGHTS IN DATA – GENERAL Alternate I (JUN 1987)	JUN 1987

52.227-17	RIGHTS IN DATA - SPECIAL WORKS	JUN 1987
52.227-21	TECHNICAL DATA DECLARATION, REVISION, AND WITHHOLDING OF PAYMENT - MAJOR SYSTEMS	JAN 1997
52.227-22	MAJOR SYSTEM - MINIMUM RIGHTS	JUN 1987
52.229-3	FEDERAL, STATE, AND LOCAL TAXES	JAN 1991
52.232-1	PAYMENTS	APR 1984
52.232-8	DISCOUNTS FOR PROMPT PAYMENT	MAY 1997
52.232-11	EXTRAS	APR 1984
52.232-17	INTEREST	JUN 1996
52.232-18	AVAILABILITY OF FUNDS	APR 1984
52.232-20	LIMITATION OF COST	APR 1984
52.232-21	LIMITATION OF COST (FACILITIES)	APR 1984
52.232-22	LIMITATION OF FUNDS	APR 1984
52.232-24	PROHIBITION OF ASSIGNMENT OF CLAIMS	JAN 1986
52.232-25	PROMPT PAYMENT	JUN 1997
52.232-33	PAYMENT BY ELECTRONIC FUNDS TRANSFER—CENTRAL CONTRACTOR REGISTRATION	MAY 1999
52.233-1	DISPUTES	DEC 1998
	ALTERNATE I (DEC 1991)	
52.233-3	PROTEST AFTER AWARD	AUG 1996
	Alternate I (JUN 1985)	
52.237-3	CONTINUITY OF SERVICES	JAN 1991
52.242-1	NOTICE OF INTENT TO DISALLOW COSTS	APR 1984
52.242-3	PENALTIES FOR UNALLOWABLE COSTS	OCT 1995
52.245-4	CERTIFICATION OF FINAL INDIRECT COSTS	JAN 1999
52.242-13	BANKRUPTCY	JUL 1995
52.242-15	STOP-WORK ORDER	AUG 1989
52.242-17	GOVERNMENT DELAY OF WORK	APR 1984
52.243-2	CHANGES - COST-REIMBURSEMENT	AUG 1987
	Alternate I (APR 1984)	
52.243-3	CHANGES - TIME-AND-MATERIALS OR LABOR-HOURS	AUG 1987
52.243-7	NOTIFICATION OF CHANGES	APR 1984
52.244-2	SUBCONTRACTS	AUG 1998
	Alternate II (AUG 1998)	
52.244-6	SUBCONTRACTS FOR COMMERCIAL ITEMS AND COMMERCIAL COMPONENTS	OCT 1998
52.245-1	PROPERTY RECORDS	APR 1984
52.245-5	GOVERNMENT PROPERTY (COST-REIMBURSEMENT, TIME-AND-MATERIAL, OR LABOR-HOUR CONTRACTS)	JAN 1986
52.245-19	GOVERNMENT PROPERTY FURNISHED "AS IS"	APR 1984
52.247-67	SUBMISSION OF COMMERCIAL TRANSPORTATION BILLS TO THE GENERAL SERVICES ADMINISTRATION FOR AUDIT	JUN 1997
52.249-4	TERMINATION FOR CONVENIENCE OF THE GOVERNMENT (SERVICES) (SHORT FORM)	APR 1984
52.249-6	TERMINATION (COST-REIMBURSEMENT)	SEP 1996
52.249-8	DEFAULT (FIXED-PRICE SUPPLY AND SERVICE)	APR 1984

52.250-1	INDEMNIFICATION UNDER PUBLIC LAW 85-804 Alternate I (APR 1984)	APR 1984
52.251-1	GOVERNMENT SUPPLY SOURCES	APR 1984
52.253-1	COMPUTER GENERATED FORMS	JAN 1991

II. AID ACQUISITION REGULATION (48 CFR CHAPTER 7) CLAUSES

NUMBER	TITLE	DATE
752.7001	BIOGRAPHICAL DATA	JUL 1999
752.7002	TRAVEL AND TRANSPORTATION	JAN 1990
752.7004	EMERGENCY LOCATOR INFORMATION	JUL 1997
752.7006	NOTICES	APR 1984
752.7007	PERSONNEL COMPENSATION	JUL 1996
752.7008	USE OF GOVERNMENT FACILITIES OR PERSONNEL	APR 1984
752.7010	CONVERSION OF U.S. DOLLARS TO LOCAL CURRENCY	APR 1984
752.7011	ORIENTATION AND LANGUAGE TRAINING	APR 1984
752.7013	CONTRACTOR-MISSION RELATIONSHIPS	OCT 1989
752.7014	NOTICE OF CHANGES IN TRAVEL REGULATIONS	JAN 1990
752.7015	USE OF POUCH FACILITIES	JUL 1997
752.7018	HEALTH AND ACCIDENT COVERAGE FOR USAID PARTICIPANT TRAINEES	JAN 1999
752.7019	PARTICIPANT TRAINING	JAN 1999
752.7023	REQUIRED VISA FORM FOR USAID PARTICIPANTS	APR 1984
752.7025	APPROVALS	APR 1984
752.7027	PERSONNEL	DEC 1990
752.7028	DIFFERENTIALS AND ALLOWANCES	JUL 1996
752.7029	POST PRIVILEGES	JUL 1993
752.7032	INTERNATIONAL TRAVEL APPROVAL AND NOTIFICATION REQUIREMENTS	JAN 1990
752.7033	PHYSICAL FITNESS	JUL 1997
752.7034	ACKNOWLEDGEMENT AND DISCLAIMER	DEC 1991
752.7035	PUBLIC NOTICES	DEC 1991

[End of Clause]

I.3 52.203-8 CANCELLATION, RESCISSION, AND RECOVERY OFFUNDS FOR ILLEGAL OR IMPROPER ACTIVITY (JAN 1997)

- (a) If the Government receives information that a contractor or a person has engaged in conduct constituting a violation of subsection (a), (b), (c), or (d) of Section 27 of the Office of Federal Procurement Policy Act (41 U.S.C. 423) (the Act), as amended by section 4304 of the 1996 National Defense Authorization Act for Fiscal Year 1996 (Pub. L. 104-106), the Government may—
 - (1) Cancel the solicitation, if the contract has not yet been awarded or issued; or
 - (2) Rescind the contract with respect to which—
 - (i) The Contractor or someone acting for the Contractor has been convicted for an offense where the conduct constitutes a violation of subsection 27 (a) or (b) of the Act for the purpose of either—
 - (A) Exchanging the information covered by such subsections for anything of value; or
 - (B) Obtaining or giving anyone a competitive advantage in the award of a Federal agency procurement contract; or
 - (ii) The head of the contracting activity has determined, based upon a preponderance of the evidence, that the Contractor or someone acting for the Contractor has engaged in conduct constituting an offense punishable under subsections 27(e)(1) of the Act.
- (b) If the Government rescinds the contract under paragraph (a) of this clause, the Government is entitled to recover, in addition to any penalty prescribed by law, the amount expended under the contract.
- (c) The rights and remedies of the Government specified herein are not exclusive, and are in addition to any other rights and remedies provided by law, regulation, or under this contract.

I.4 52.204-1 APPROVAL OF CONTRACT (DEC 1989)

This contract is subject to the written approval of mg or a duly authorized representative, and shall not be binding until so approved.

[End of Clause]

I.5 52.215-19 NOTIFICATION OF OWNERSHIP CHANGES (OCT 1997)

- (a) The Contractor shall make the following notifications in writing:
 - (1) When the Contractor becomes aware that a change in its ownership has occurred, or is certain to occur, that could result in changes in the valuation of its capitalized assets in the accounting records, the Contractor shall notify the Administrative Contracting Officer (ACO) within 30 days.
 - (2) The Contractor shall also notify the ACO within 30 days whenever changes to asset valuations or any other cost changes have occurred or are certain to occur as a result of a change in ownership.
- (b) The Contractor shall—
 - (1) Maintain current, accurate, and complete inventory records of assets and their costs;
 - (2) Provide the ACO or designated representative ready access to the records upon request;
 - (3) Ensure that all individual and grouped assets, their capitalized values, accumulated depreciation or amortization, and remaining useful lives are identified accurately before and after each of the Contractor's ownership changes; and
 - (4) Retain and continue to maintain depreciation and amortization schedules based on the asset records maintained before each Contractor ownership change.
- (c) The Contractor shall include the substance of this clause in all subcontracts under this contract that meet the applicability requirement of FAR 15.408(k).

I.6 SMALL BUSINESS SUBCONTRACTING PLAN

(a) This clause does not apply to small business concerns.

(b) Definitions. As used in this clause--

"Commercial item" means a product or service that satisfies the definition of commercial item in section 2.101 of the Federal Acquisition Regulation.

"Commercial plan" means a subcontracting plan (including goals) that covers the offeror's fiscal year and that applies to the entire production of commercial items sold by either the entire company or a portion thereof (e.g., division, plant, or product line).

"Individual contract plan" means a subcontracting plan that covers the entire contract period (including option periods), applies to a specific contract, and has goals that are based on the offeror's planned subcontracting in support of the specific contract, except that indirect costs incurred for common or joint purposes may be allocated on a prorated basis to the contract.

"Master plan" means a subcontracting plan that contains all the required elements of an individual contract plan, except goals, and may be incorporated into individual contract plans, provided the master plan has been approved.

"Subcontract" means any agreement (other than one involving an employer-employee relationship) entered into by a Federal Government prime Contractor or subcontractor calling for supplies or services required for performance of the contract or subcontract.

(c) The offeror, upon request by the Contracting Officer, shall submit and negotiate a subcontracting plan, where applicable, that separately addresses subcontracting with small business, HUB Zone small business concerns, small disadvantaged business, and women-owned small business concerns. If the offeror is submitting an individual contract plan, the plan must separately address subcontracting with small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns, with a separate part for the basic contract and separate parts for each option (if any). The plan shall be included in and made a part of the resultant contract. The subcontracting plan shall be negotiated within the time specified by the Contracting Officer. Failure to submit and negotiate the subcontracting plan shall make the offeror ineligible for award of a contract.

(d) The offeror's subcontracting plan shall include the following:

(1) Goals, expressed in terms of percentages of total planned subcontracting dollars, for the use of small business, HUB Zone small business, small disadvantaged business, and women-owned small business concerns as subcontractors. The offeror shall include all subcontracts that contribute to contract performance, and may include a proportionate share of products and services that are normally allocated as indirect costs.

(2) A statement of--

(i) Total dollars planned to be subcontracted for an individual contract plan; or the offeror's total projected sales, expressed in dollars, and the total value of projected subcontracts to support the sales for a commercial plan;

(ii) Total dollars planned to be subcontracted to small business concerns;

(iii) Total dollars planned to be subcontracted to HUBZone small business concerns;

(iv) Total dollars planned to be subcontracted to small disadvantaged business concerns; and

(v) Total dollars planned to be subcontracted to women-owned small business concerns.

(3) A description of the principal types of supplies and services to be subcontracted, and an identification of the types planned for subcontracting to--

(i) Small business concerns;

(ii) HUBZone small business concerns;

(iii) Small disadvantaged business concerns; and

(iv) Women-owned small business concerns.

(4) A description of the method used to develop the subcontracting goals in paragraph (d)(1) of this clause.

(5) A description of the method used to identify potential sources for solicitation purposes (e.g., existing company source lists, the Procurement Marketing and Access Network (PRO-Net) of the Small Business Administration (SBA), the National Minority Purchasing Council Vendor Information Service, the Research and Information Division of the Minority Business Development Agency in the Department of Commerce, or small, HUBZone, small disadvantaged, and women-owned small business trade associations). A firm may rely on the information contained in PRO-Net as an accurate representation of a concern's size and ownership characteristics for the purposes of maintaining a small, HUBZone, small disadvantaged and women-owned small business source list. Use of PRO-Net as its source list does not relieve a firm of its responsibilities (e.g., outreach, assistance, counseling, or publicizing subcontracting opportunities) in this clause.

(6) A statement as to whether or not the offeror included indirect costs in establishing subcontracting goals, and a description of the method used to determine the proportionate share of indirect costs to be incurred with--

(i) Small business concerns;

(ii) HUBZone small business concerns;

(iii) Small disadvantaged business concerns; and

(iv) Women-owned small business concerns.

(7) The name of the individual employed by the offeror who will administer the offeror's subcontracting program, and a description of the duties of the individual.

(8) A description of the efforts the offeror will make to assure that small business, HUBZone small business, small disadvantaged business and women-owned small business concerns have an equitable opportunity to compete for subcontracts.

(9) Assurances that the offeror will include the clause of this contract entitled "Utilization of Small Business Concerns" in all subcontracts that offer further subcontracting opportunities, and that the offeror will require all subcontractors (except small business concerns) that receive subcontracts in excess of \$500,000 (\$1,000,000 for construction of any public facility) to adopt a subcontracting plan that complies with the requirements of this clause.

(10) Assurances that the offeror will--

(i) Cooperate in any studies or surveys as may be required;

(ii) Submit periodic reports so that the Government can determine the extent of compliance by the offeror with the subcontracting plan;

(iii) Submit Standard Form (SF) 294, Subcontracting Report for Individual Contracts, and/or SF 295, Summary Subcontract Report, in accordance with the instructions on the forms or as provided in agency regulations and in paragraph (j) of this clause; and

(iv) Ensure that its subcontractors agree to submit SF 294 and SF 295.

(11) A description of the types of records that will be maintained concerning procedures that have been adopted to comply with the requirements and goals in the plan, including establishing source lists; and a description of the offeror's efforts to locate small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns and award subcontracts to them. The records shall include at least the following (on a plant-wide or company-wide basis, unless otherwise indicated):

(i) Source lists (e.g., PRO-Net), guides, and other data that identify small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns.

(ii) Organizations contacted in an attempt to locate sources that are small business, HUBZone small business, small disadvantaged business, or women-owned small business concerns.

(iii) Records on each subcontract solicitation resulting in an award of more than \$100,000, indicating--

(A) Whether small business concerns were solicited and, if not, why not;

(B) Whether HUBZone small business concerns were solicited and, if not, why not;

(C) Whether small disadvantaged business concerns were solicited and, if not, why not;

(D) Whether women-owned small business concerns were solicited and, if not, why not; and

(E) If applicable, the reason award was not made to a small business concern.

(iv) Records of any outreach efforts to contact--

(A) Trade associations;

(B) Business development organizations; and

(C) Conferences and trade fairs to locate small, HUBZone small, small disadvantaged, and women-owned small business sources.

(v) Records of internal guidance and encouragement provided to buyers through--

(A) Workshops, seminars, training, etc.; and

(B) Monitoring performance to evaluate compliance with the program's requirements.

(vi) On a contract-by-contract basis, records to support award data submitted by the offeror to the Government, including the name, address, and business size of each subcontractor. Contractors having commercial plans need not comply with this requirement. (e) In order to effectively implement this plan to the extent consistent with efficient contract performance, the Contractor shall perform the following functions:

(1) Assist small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns by arranging solicitations, time for the preparation of bids, quantities, specifications, and delivery schedules so as to facilitate the participation by such concerns. Where the Contractor's lists of potential small business, HUBZone small business, small disadvantaged business, and women-owned small business subcontractors are excessively long, reasonable effort shall be made to give all such small business concerns an opportunity to compete over a period of time.

- (2) Provide adequate and timely consideration of the potentialities of small business, HUBZone small business, small disadvantaged business, and women-owned small business concerns in all "make-or-buy" decisions.
- (3) Counsel and discuss subcontracting opportunities with representatives of small business, HUBZone small business, small disadvantaged business, and women-owned small business firms.
- (4) Provide notice to subcontractors concerning penalties and remedies for misrepresentations of business status as small, HUBZone small, small disadvantaged, or women-owned small business for the purpose of obtaining a subcontract that is to be included as part or all of a goal contained in the Contractor's subcontracting plan.
- (f) A master plan on a plant or division-wide basis that contains all the elements required by paragraph (d) of this clause, except goals, may be incorporated by reference as a part of the subcontracting plan required of the offeror by this clause; provided--
- (1) The master plan has been approved;
- (2) The offeror ensures that the master plan is updated as necessary and provides copies of the approved master plan, including evidence of its approval, to the Contracting Officer; and
- (3) Goals and any deviations from the master plan deemed necessary by the Contracting Officer to satisfy the requirements of this contract are set forth in the individual subcontracting plan.
- (g) A commercial plan is the preferred type of subcontracting plan for contractors furnishing commercial items. The commercial plan shall relate to the offeror's planned subcontracting generally, for both commercial and Government business, rather than solely to the Government contract. Commercial plans are also preferred for subcontractors that provide commercial items under a prime contract, whether or not the prime contractor is supplying a commercial item.
- (h) Prior compliance of the offeror with other such subcontracting plans under previous contracts will be considered by the Contracting Officer in determining the responsibility of the offeror for award of the contract.
- (i) The failure of the Contractor or subcontractor to comply in good faith with--
- (1) The clause of this contract entitled "Utilization Of Small Business Concerns;" or
- (2) An approved plan required by this clause, shall be a material breach of the contract.
- (j) The Contractor shall submit the following reports:
- (1) Standard Form 294, Subcontracting Report for Individual Contracts. This report shall be submitted to the Contracting Officer semiannually and at contract completion. The report covers subcontract award data related to this contract. This report is not required for commercial plans.
- (2) Standard Form 295, Summary Subcontract Report. This report encompasses all the contracts with the awarding agency. It must be submitted semi-annually for contracts with the Department of Defense and annually for contracts with civilian agencies. If the reporting activity is covered by a commercial plan, the reporting activity must report annually all subcontract awards under that plan. All reports submitted at the close of each fiscal year (both individual and commercial plans) shall include a breakout, in the Contractor's format, of subcontract awards, in whole dollars, to small disadvantaged business concerns by Standard Industrial Classification (SIC) Major Group. For a commercial plan, the Contractor may obtain from each of its subcontractors a predominant SIC Major Group and report all awards to that subcontractor under its predominant SIC Major Group.

[End of Clause]

I.7 INCENTIVE SUBCONTRACTING PROGRAM FOR SMALL AND SMALL DISADVANTAGED BUSINESS CONCERNS

In accordance with FAR 52.219-10, Incentive Subcontracting Program for Small and Small Disadvantaged Business Concerns, the following terms apply: If the Contractor exceeds its subcontracting goals, it will receive 1 percent of the dollars in excess of each goal.

I.8 52.219-23 NOTICE OF PRICE EVALUATION ADJUSTMENT FOR SMALL DISADVANTAGED BUSINESS CONCERNS (OCT 1998)

(a) Definitions. As used in this clause--

Small disadvantaged business concern means an offeror that represents, as part of its offer, that it is a small business under the size standard applicable to this acquisition; and either--

- (1) It has received certification by the Small Business Administration as a small disadvantaged business concern consistent with 13 CFR 124, Subpart B; and
 - (i) No material change in disadvantaged ownership and control has occurred since its certification;
 - (ii) Where the concern is owned by one or more disadvantaged individuals, the net worth of each individual upon whom the certification is based does not exceed \$750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and
 - (iii) It is listed, on the date of its representation, on the register of small disadvantaged business concerns maintained by the Small Business Administration;
- (2) It has submitted a completed application to the Small Business Administration or a Private Certifier to be certified as a small disadvantaged business concern in accordance with 13 CFR 124, Subpart B, and a decision on that application is pending, and that no material change in disadvantaged ownership and control has occurred since its application was submitted. In this case, in order to receive the benefit of a price evaluation adjustment, an offeror must receive certification as a small disadvantaged business concern by the Small Business Administration prior to contract award; or
- (3) Is a joint venture as defined in 13 CFR 124.1002(f).

Historically black college or university means an institution determined by the Secretary of Education to meet the requirements of 34 CFR 608.2. For the Department of Defense (DOD), the National Aeronautics and Space Administration (NASA), and the Coast Guard, the term also includes any nonprofit research institution that was an integral part of such a college or university before November 14, 1986.

Minority institution means an institution of higher education meeting the requirements of Section 1046(3) of the Higher Education Act of 1965 (20 U.S.C. 1135d-5(3)) which, for purposes of this clause, includes a Hispanic-serving institution of higher education as defined in Section 316(b)(1) of the Act (20 U.S.C. 1059c(b)(1)).

United States means the United States, its territories and possessions, the Commonwealth of Puerto Rico, the U.S. Trust Territory of the Pacific Islands, and the District of Columbia.

(b) Evaluation adjustment. (1) Offers will be evaluated by adding a factor of **10** percent to the price of all offers, except—

- (i) Offers from small disadvantaged business concerns that have not waived the adjustment;
- (ii) For DOD, NASA, and Coast Guard acquisitions, otherwise successful offers from historically black colleges or universities or minority institutions;

(iii) Otherwise successful offers of eligible products under the Trade Agreements Act when the dollar threshold for application of the Act is equaled or exceeded (see section 25.402 of the Federal Acquisition Regulation (FAR));

(iv) Otherwise successful offers where application of the factor would be inconsistent with a Memorandum of Understanding or other international agreement with a foreign government; and

(v) For DOD acquisitions, otherwise successful offers of qualifying country end products (see sections 225.000-70 and 252.225-7001 of the Defense FAR Supplement).

(2) The factor shall be applied on a line item basis or to any group of items on which award may be made. Other evaluation factors described in the solicitation shall be applied before application of the factor. The factor may not be applied if using the adjustment would cause the contract award to be made at a price that exceeds the fair market price by more than the factor in paragraph (b)(1) of this clause.

(c) Waiver of evaluation adjustment. A small disadvantaged business concern may elect to waive the adjustment, in which case the factor will be added to its offer for evaluation purposes. The agreements in paragraph (d) of this clause do not apply to offers that waive the adjustment.

____ Offeror elects to waive the adjustment.

(d) Agreements. (1) A small disadvantaged business concern, that did not waive the adjustment, agrees that in performance of the contract, in the case of a contract for--

(i) Services, except construction, at least 50 percent of the cost of personnel for contract performance will be spent for employees of the concern;

(ii) Supplies (other than procurement from a non-manufacturer of such supplies), at least 50 percent of the cost of manufacturing, excluding the cost of materials, will be performed by the concern;

(iii) General construction, at least 15 percent of the cost of the contract, excluding the cost of materials, will be performed by employees of the concern; or

(iv) Construction by special trade contractors, at least 25 percent of the cost of the contract, excluding the cost of materials, will be performed by employees of the concern.

(2) A small disadvantaged business concern submitting an offer in its own name agrees to furnish in performing this contract only end items manufactured or produced by small disadvantaged business concerns in the United States. This paragraph does not apply in connection with construction or service contracts.

[End of Clause]

I.9 52.227-23 RIGHTS TO PROPOSAL DATA (TECHNICAL) (JUN 1987)

Except for data contained on pages _____, it is agreed that as a condition of award of this contract, and notwithstanding the conditions of any notice appearing thereon, the Government shall have unlimited rights (as defined in the Rights in Data--General" clause contained in this contract) in and to the technical data contained in the proposal dated _____, upon which this contract is based.

[End of Clause]

I.10 52.244-2 SUBCONTRACTS (AUG 1998)

(a) Definitions. As used in this clause--

Approved purchasing system means a Contractor's purchasing system that has been reviewed and approved in accordance with Part 44 of the Federal Acquisition Regulation (FAR).

Consent to subcontract means the Contracting Officer's written consent for the Contractor to enter into a particular subcontract.

Subcontract means any contract, as defined in FAR Subpart 2.1, entered into by a subcontractor to furnish supplies or services for performance of the prime contract or a subcontract. It includes, but is not limited to, purchase orders, and changes and modifications to purchase orders.

(b) This clause does not apply to subcontracts for special test equipment when the contract contains the clause at FAR 52.245-18, Special Test Equipment.

(c) When this clause is included in a fixed-price type contract, consent to subcontract is required only on unpriced contract actions (including unpriced modifications or unpriced delivery orders), and only if required in accordance with paragraph (d) or (e) of this clause.

(d) If the Contractor does not have an approved purchasing system, consent to subcontract is required for any subcontract that--

(1) Is of the cost-reimbursement, time-and-materials, or labor-hour type; or

(2) Is fixed-price and exceeds--

(i) For a contract awarded by the Department of Defense, the Coast Guard, or the National Aeronautics and Space Administration, the greater of the simplified acquisition threshold or 5 percent of the total estimated cost of the contract; or

(ii) For a contract awarded by a civilian agency other than the Coast Guard and the National Aeronautics and Space Administration, either the simplified acquisition threshold or 5 percent of the total estimated cost of the contract.

(e) If the Contractor has an approved purchasing system, the Contractor nevertheless shall obtain the Contracting Officer's written consent before placing the following subcontracts:

◆ -----

◆ -----

◆ -----

(f)(1) The Contractor shall notify the Contracting Officer reasonably in advance of placing any subcontract or modification thereof for which consent is required under paragraph (c), (d), or (e) of this clause, including the following information:

(i) A description of the supplies or services to be subcontracted.

(ii) Identification of the type of subcontract to be used.

(iii) Identification of the proposed subcontractor.

(iv) The proposed subcontract price.

(v) The subcontractor's current, complete, and accurate cost or pricing data and Certificate of Current Cost or Pricing Data, if required by other contract provisions.

(vi) The subcontractor's Disclosure Statement or Certificate relating to Cost Accounting Standards when such data are required by other provisions of this contract.

(vii) A negotiation memorandum reflecting--

(A) The principal elements of the subcontract price negotiations;

(B) The most significant considerations controlling establishment of initial or revised prices;

(C) The reason cost or pricing data were or were not required;

(D) The extent, if any, to which the Contractor did not rely on the subcontractor's cost or pricing data in determining the price objective and in negotiating the final price;

(E) The extent to which it was recognized in the negotiation that the subcontractor's cost or pricing data were not accurate, complete, or current; the action taken by the Contractor and the subcontractor; and the effect of any such defective data on the total price negotiated;

(F) The reasons for any significant difference between the Contractor's price objective and the price negotiated; and

(G) A complete explanation of the incentive fee or profit plan when incentives are used. The explanation shall identify each critical performance element, management decisions used to quantify each incentive element, reasons for the incentives, and a summary of all trade-off possibilities considered.

(2) The Contractor is not required to notify the Contracting Officer in advance of entering into any subcontract for which consent is not required under paragraph (c), (d), or (e) of this clause.

(g) Unless the consent or approval specifically provides otherwise, neither consent by the Contracting Officer to any subcontract "nor" approval of the Contractor's purchasing system shall constitute a determination--

- (1) Of the acceptability of any subcontract terms or conditions;
- (2) Of the allowability of any cost under this contract; or
- (3) To relieve the Contractor of any responsibility for performing this contract.

(h) No subcontract or modification thereof placed under this contract shall provide for payment on a cost-plus-a-percentage-of-cost basis, and any fee payable under cost-reimbursement type subcontracts shall not exceed the fee limitations in FAR 15.404-4(c)(4)(i).

(i) The Contractor shall give the Contracting Officer immediate written notice of any action or suit filed and prompt notice of any claim made against the Contractor by any subcontractor or vendor that, in the opinion of the Contractor, may result in litigation related in any way to this contract, with respect to which the Contractor may be entitled to reimbursement from the Government.

(j) The Government reserves the right to review the Contractor's purchasing system as set forth in FAR Subpart 44.3.

(k) Paragraphs (d) and (f) of this clause do not apply to the following subcontracts, which were evaluated during negotiations:

- ◆ -----
- ◆ -----
- ◆ -----

(End of clause)

I.11 52.252-4 ALTERATIONS IN CONTRACT (APR 1984)

FAR clause 52.204-2 is altered by AIDAR clause 752.204-2.
FAR clause 52.228-3 is altered by AIDAR clause 752.228-3.

[End of Clause]

I.12 COMMUNICATIONS PRODUCTS (OCT 1994)

(a) Definition - Communications products are any printed materials (other than non-color photocopy material), photographic services or video production services.

(b) Standards - USAID has established standards for communications products. These standards must be followed unless otherwise specifically provided in the contract or approved in writing by the contracting officer. A copy of the standards for USAID financed publications and video productions is attached.

(c) Communications products which meet any of the following criteria are not eligible for USAID financing under this agreement unless specifically authorized in the contract or in writing by the contracting officer:

- (1) All communications materials funded by operating expense account funds;
- (2) Any communication products costing over \$25,000, including the costs of both preparation and execution. For example, in the case of a publication, the costs will include research, writing and other editorial services (including any associated overhead), design, layout and production costs.
- (3) Any communication products that will be sent directly to, or likely to be seen by, a Member of Congress or Congressional staffer; and
- (4) Any publication that will have more than 50 percent of its copies distributed in the United States (excluding copies provided to CDIE and other USAID/W offices for internal use.

(d) The initial proposal must provide a separate estimate of the cost of every communications product as defined in paragraph (a) above [not just those, which meet the criteria in paragraph (c),] which is anticipated under the contract. Each estimate must include all of the costs associated with preparation and execution of the product. Any subsequent request for approval of a covered communication product must provide the same type of cost information.

[End of Clause]

I.13 52.222-35 AFFIRMATIVE ACTION FOR DISABLED VETERANS AND VETERANS OF THE VIETNAM ERA (APR 1998)

(a) Definitions. As used in this clause—

“All employment openings” includes all positions except executive and top management, those positions that will be filled from within the contractor’s organization, and positions lasting 3 days or less. This term includes full-time employment, temporary employment of more than 3 days’ duration, and part-time employment. “Appropriate office of the State employment service system,” means the local office of the Federal-State national system of public Employment offices with assigned responsibility to serve the area where the employment opening is to be filled, including the District of Columbia, Guam, the Commonwealth of Puerto Rico, and the Virgin Islands.

“Positions that will be filled from within the Contractor’s organization” means employment openings for which no consideration will be given to persons outside the Contractor’s organization (including any affiliates, subsidiaries, and parent companies) and includes any openings that the Contractor proposes to fill from regularly established “recall” lists. The exception does not apply to a particular opening once an employer decides to consider applicants outside of its organization.

“Veteran of the Vietnam era” means a person who—

- (1) Served on active duty for a period of more than 180 days, any part of which occurred between August 5, 1964, and May 7, 1975, and was discharged or released therefrom with other than a dishonorable discharge; or
- (2) Was discharged or released from active duty for a service-connected disability if any part of such active duty was performed between August 5, 1964 and May 7, 1975.

(b) General.

(1) Regarding any position for which the employee or applicant for employment is qualified, the Contractor shall not discriminate against the individual because the individual is a disabled veteran or a veteran of the Vietnam era. The Contractor agrees to take affirmative action to employ, advance in employment, and otherwise treat qualified disabled veterans and veterans of the Vietnam era without discrimination based upon their disability or veterans’ status in all employment practices such as—

- (i) Employment;
- (ii) Upgrading;
- (iii) Demotion or transfer;
- (iv) Recruitment;
- (v) Advertising;
- (vi) Layoff or termination;
- (vii) Rates of pay or other forms of compensation; and
- (viii) Selection for training, including apprenticeship.

(2) The Contractor agrees to comply with the rules, regulations, and relevant orders of the Secretary of Labor (Secretary) issued under the Vietnam Era Veterans’ Readjustment Assistance Act of 1972 (the Act), as amended.

(c) Listing openings.

1) The Contractor agrees to list all employment openings existing at contract award or occurring during contract performance, at an appropriate office of the State employment service system in the locality where the opening occurs. These openings include those occurring at any Contractor facility, including one not connected with performing this contract. An independent corporate affiliate is exempt from this requirement.

(2) State and local government agencies holding Federal contracts of \$10,000 or more shall also list all employment openings with the appropriate office of the State employment service.

(3) The listing of employment openings with the State employment service system is required at least concurrently with using any other recruitment source or effort and involves the obligations of placing a bona fide job order, including accepting referrals of veterans and nonveterans. This listing does not require hiring any particular job applicant or hiring from any particular group of job applicants and is not intended to relieve the Contractor from any requirements of Executive orders or regulations concerning nondiscrimination in employment.

(4) Whenever the Contractor becomes contractually bound to the listing terms of this clause, it shall advise the State employment service system, in each State where it has establishments, of the name and location of each hiring location in the State. As long as the Contractor is contractually bound to these terms and has so advised the State system, it need not advise the State system of

subsequent contracts. The Contractor may advise the State system when it is no longer bound by this contract clause.

(d) Applicability.

(1) This clause does not apply to the listing of employment openings that occur and are filled outside the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, Guam, and the Virgin Islands.

(2) The terms of paragraph © above of this clause do not apply to openings that the Contractor proposes to fill from within its own organization or under a customary and traditional employer-union hiring arrangement. This exclusion does not apply to a particular opening once an employer decides to consider applicants outside of its own organization or employer-union arrangement for that opening.

(e) Postings.

(1) The Contractor agrees to post employment notices stating

- (i) The Contractor's obligation under the law to take affirmative action to employ and advance in employment qualified disabled veterans and veterans of the Vietnam era, and
- (ii) The rights of applicants and employees.

(2) These notices shall be posted in conspicuous places that are available to employees and applicants for employment. They shall be in a form prescribed by the Deputy Assistant Secretary for Federal Contract Compliance Programs, Department of Labor (Deputy Assistant Secretary), and provided by or through the Contracting Officer.

(3) The Contractor shall notify each labor union or representative of workers with which it has a collective bargaining agreement or other contract understanding, that the Contractor is bound by the terms of the Act, and is committed to take affirmative action to employ, and advance in employment, qualified disabled veterans and veterans of the Vietnam era.

(f) Noncompliance. If the Contractor does not comply with the requirements of this clause, appropriate actions may be taken under the rules, regulations, and relevant orders of the Secretary issued pursuant to the Act.

(g) Subcontracts. The Contractor shall include the terms of this clause in every subcontract or purchase order of \$10,000 or more unless exempted by rules, regulations, or orders of the Secretary. The Contractor shall act as specified by the Deputy Assistant Secretary to enforce the terms, including action for noncompliance.

I.14 52.228-3 WORKERS' COMPENSATION INSURANCE (DEFENSE BASE ACT) (APR 1984)

The Contractor shall (a) provide, before commencing performance under this contract, such workers' compensation insurance or security as the Defense Base Act (42 U.S.C. 1651 et seq.) requires and (b) continue to maintain it until performance is completed. The Contractor shall insert, in all subcontracts under this contract to which the Defense Base Act applies, a clause similar to this clause (including this sentence) imposing upon those subcontractors this requirement to comply with the Defense Base Act.

[End of Clause]

I.15 52.242-4 CERTIFICATION OF FINAL INDIRECT COSTS (JAN 1997)

(a) The Contractor shall—

- (1) Certify any proposal to establish or modify final indirect cost rates;
- (2) Use the format in paragraph © of this clause to certify; and
- (3) Have the certificate signed by an individual of the Contractor's organization at a level no lower than a vice president or chief financial officer of the business segment of the Contractor that submits the proposal.

(b) Failure by the Contractor to submit a signed certificate, as described in this clause, may result in final indirect costs at rates unilaterally established by the Contracting Officer.

(c) The certificate of final indirect costs shall read as follows:

CERTIFICATE OF FINAL INDIRECT COSTS

This is to certify that I have reviewed this proposal to establish final indirect cost rates and to the best of my knowledge and belief:

1. All costs included in this proposal (identify proposal and date) to establish final indirect costs rates for (identify period covered by rate) are allowable in accordance with the cost principles of the Federal Acquisition Regulation (FAR) and its supplements applicable to the contracts to which the final indirect cost rates will apply; and
2. This proposal does not include any costs which are expressly unallowable under applicable cost principles of the FAR or its supplements.

Firm: _____

Signature: _____

Name of Certifying Official: _____

Title: _____

Date of Execution: _____

[End of Clause]

I.16 NOTIFICATION OF CHANGES

In accordance with FAR 52.243-7, Notification of Changes, the Contractor shall notify the Contracting Officer in writing promptly, within 5 calendar days from the date that the Contractor identifies any Government conduct that the Contractor regards as a change to the contract terms and conditions. The Contracting Officer shall promptly, within 5 calendar days after receipt of notice, respond to the notice in writing.

[End of Clause]

I.17 752.245-70 GOVERNMENT PROPERTY—USAID REPORTING REQUIREMENTS

The term “Government furnished property” wherever it may appear in the following clause, shall mean (1) non-expendable personal property owned by or leased to the U.S. Government and furnished to the contractor and (2) personal property furnished either prior to or during the performance of this contract by any U.S. Government accountable officer to the contractor for use in connection with performance of this contract and identified by such officer as accountable. The term “government property”, wherever it may appear in the following clause, shall mean government-furnished property and non-expendable personal property title to which vests in the U.S. Government under this contract. Non-expendable property, for purposes of this contract, is defined as property which is complete in itself, does not lose its identity or become a component part of another article when put into use; is durable, with an expected service life of two years or more; and which has a unit cost of more than \$500.

Reporting Requirement: to be inserted following the text of the FAR clause. Reporting Requirements: The contractor will submit an annual report on all non-expendable property in a form and manner acceptable to USAID substantially as follows:

ANNUAL REPORT OF GOVERNMENT PROPERTY IN CONTRACTOR’S CUSTODY

(Name of Contractor)
As of (End of Contract Year), 19xx

Motor Vehicles	Furniture and furnishings Office Living Quarters	Other non-expendable property
----------------	--	----------------------------------

A. Value of property as of last report.

B. Transactions during this reporting period.

1. Acquisitions (add):

- a. Purchased by contractor 1/
- b. Transferred from USAID 2/
- c. Transferred from others- Without reimbursement 3/

2. Disposals (deduct):

- a. Returned to USAID
- b. Transferred to USAID-Contractor Purchased
- c. Transferred to other Government agencies 3/
- d. Other disposals 3/

C. Value of property as of reporting date.

D. Estimated average age of contractor held property

Years	Years	Years
-------	-------	-------

PROPERTY INVENTORY VERIFICATIONS

I attest that (1) physical inventories of Government property are taken not less frequently than annually; (2) the accountability records maintained for Government property in our possession are in agreement with such inventories; and (3) the total of the detailed accountability records maintained agrees with the property value shown opposite line C above, and the estimated average age of each category of property is as cited opposite line D above.

Authorized Signature_____

[End of Clause]

I.18 752.7005 SUBMISSION REQUIREMENTS FOR DEVELOPMENT EXPERIENCE DOCUMENTS (OCT 1997)

(a) Contract Reports and Information/Intellectual Products.

(1) The Contractor shall submit to PPC/CDIE/DI copies of reports and information products which describe, communicate or organize program/project development assistance activities, methods, technologies, management, research, results and experience as outlined in the Agency's ADS Chapter 540, section E540.5.2b(3). Information may be obtained from the Cognizant Technical Officer (CTO).

These reports include: assessments, evaluations, studies, development experience documents, technical reports and annual reports. The Contractor shall also submit to PPC/CDIE/DI copies of information products including training materials, publications, databases, computer software programs, videos and other intellectual deliverable materials required under the Contract Schedule. Time-sensitive materials such as newsletters, brochures, bulletins or periodic reports covering periods of less than a year are not to be submitted.

(2) Upon contract completion, the contractor shall submit to PPC/CDIE/DI an index of all reports and information/ intellectual products referenced in paragraph (a)(1).

(b) Submission requirements.

(1) Distribution.

(i) The contractor shall submit contract reports and information/intellectual products (referenced in paragraph (a)(1) above) in electronic format and hard copy (one copy) to U.S. Agency for International Development, PPC/CDIE/DI, Attn: ACQUISITIONS, Washington D.C. 20523 at the same time submission is made to the CTO.

(ii) The contractor shall submit the reports index referenced in paragraph (a)(2) above and any reports referenced in paragraph (a)(1) above that have not been previously submitted to PPC/CDIE/DI, within 30 days after completion of the contract to the address cited in paragraph (b)(1)(i) above.

(2) Format.

(i) Descriptive information is required for all Contractor products submitted. The title page of all reports and information products shall include the contract number(s), contractor name(s), name of the USAID cognizant technical office, the publication or issuance date of the document, document title, author name(s), and strategic objective or activity title and associated number. In addition, all materials submitted in accordance with this clause shall have attached on a separate cover sheet the name, organization, address, telephone number, fax number, and Internet address of the submitting party.

(ii) The hard copy report shall be prepared using non-glossy paper (preferably recycled and white or off-white) using black ink. Elaborate artwork, multicolor printing and expensive bindings are not to be used. Whenever possible, pages shall be printed on both sides.

(iii) The electronic document submitted shall consist of only one electronic file which comprises the complete and final equivalent of the hard copy submitted.

(iv) Acceptable software formats for electronic documents include WordPerfect, Microsoft Word, ASCII, and Portable Document Format (PDF). Submission in Portable Document Format is encouraged.

(v) The electronic document submission shall include the following descriptive information:

(A) Name and version of the application software used to create the file, e.g., WordPerfect Version 6.1 or ASCII or PDF.

(B) The format for any graphic and/or image file submitted, e.g., TIFF-compatible.

(C) Any other necessary information, e.g. special backup or data compression routines, software used for storing/retrieving submitted data, or program installation instructions.

I.19 COMMUNICATIONS PRODUCTS (OCT 1994)

- (a) Definition - Communications products are any printed materials (other than non-color photocopy material), photographic services or video production services.
- (b) Standards - USAID has established standards for communications products. These standards must be followed unless otherwise specifically provided in the contract or approved in writing by the contracting officer. A copy of the standards for USAID financed publications and video productions is attached.
- (c) Communications products which meet any of the following criteria are not eligible for USAID financing under this agreement unless specifically authorized in the contract or in writing by the contracting officer:
 - (1) All communications materials funded by operating expense account funds;
 - (2) Any communication products costing over \$25,000, including the costs of both preparation and execution. For example, in the case of a publication, the costs will include research, writing and other editorial services (including any associated overhead), design, layout and production costs.
 - (3) Any communication products that will be sent directly to, or likely to be seen by, a Member of Congress or Congressional staffer; and
 - (2) Any publication that will have more than 50 percent of its copies distributed in the United States (excluding copies provided to CDIE and other USAID/W offices for internal use.
- (d) The initial proposal must provide a separate estimate of the cost of every communications product as defined in paragraph (a) above [not just those which meet the criteria in paragraph ©] which is anticipated under the contract. Each estimate must include all of the costs associated with preparation and execution of the product. Any subsequent request for approval of a covered communication product must provide the same type of cost information.

[End of Clause]

[END OF SECTION I]

PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS**SECTION J - LIST OF ATTACHMENTS**

TITLE	PAGE(S)
1. USAID Geographic Codes	1
2. USAID FOR 1420-17 - Contractor Employee Biographical Data Sheet	3
3. SF LLL - Disclosure of Lobbying Activities	1
4. Certificate of Current Cost and Pricing	1
5. List of Organizations Requesting Document	5
6. Model Small Business/Small Disadvantaged Subcontracting Plan	2
7. Exhibits for Development Information Service (DIS) RFP are located at http://www.dec.org/dis-rfp-mop-00-1518/	1
8. Equipment List (see attachment 8 and/or the following Excel files: (a) rrs.furniture.xls, (b) rrs.equipment.xls, (c) rrs software inventory –5-2000.xls (e) esds.ssoftware.final.xls (e) esds.hardware.final.xls.	20
9. Development Information Service labor matrix in accordance with requirement in section C. The labor matrix can be obtained from attachment number nine (9) or excel file: RFP COST.XLS	19
10. Department of Defense, Contract Security Classification Specification (form DD-254). This document is an attachment to the cover letter. It is not available electronically because of the signature that is required from the USAID office of Security for this RFP.	2
11. Certification Package	26

ATTACHMENT 1**IDENTIFICATION OF PRINCIPAL GEOGRAPHIC CODE NUMBERS**

The USAID Geographic Code Book sets forth the official description of all geographic codes used by USAID in authorizing or implementing documents, to designate authorized source countries or areas. The following are summaries of the principal codes:

- (a) Code 000--The United States: The United States of America, any State(s) of the United States, the District of Columbia, and areas of U.S.-associated sovereignty, including commonwealths, territories and possessions.
- (b) Code 899--Any area or country, except the cooperating country itself and the following foreign policy restricted countries:
Afghanistan, Libya, Vietnam, Cuba, Cambodia, Laos, Iraq, Iran, North Korea, Syria and People's Republic of China.
- (c) Code 935--Any area or country including the cooperating country, but excluding the foreign policy restricted countries.
- (d) Code 941--The United States and any independent country (excluding foreign policy restricted countries), except the cooperating country itself and the following: Albania, Andorra, Angola, Armenia, Austria, Australia, Azerbaijan, Bahamas, Bahrain, Belgium, Bosnia and Herzegovina, Bulgaria, Belarus, Canada, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Gabon, Georgia, Germany, Greece, Hong Kong, Hungary, Iceland, Ireland, Italy, Japan, Kazakhstan, Kuwait, Kyrgyzstan, Latvia, Liechtenstein, Lithuania, Luxembourg, Macedonia*, Malta, Moldova, Monaco, Mongolia, Montenegro*, Netherlands, New Zealand, Norway, Poland, Portugal, Qatar, Romania, Russia, San Marino, Saudi Arabia, Serbia*, Singapore, Slovak Republic, Slovenia, South Africa, Spain, Sweden, Switzerland, Taiwan*, Tajikistan, Turkmenistan, Ukraine, United Arab Emirates, United Kingdom, Uzbekistan, and Vatican City.

Has the status of a "Geopolitical Entity", rather than an independent country.

ATTACHMENT 2

USAID FORM 1420-17 - CONTRACTOR BIOGRAPHICAL DATA SHEET

OMB Control No. 0412-0520; Expiration Date: 08/31/2000

CONTRACTOR EMPLOYEE BIOGRAPHICAL DATA SHEET						
1. Name (Last, First, Middle)			2. Contractor's Name			
3. Employee's Address (include ZIP code)			4. Contract Number		5. Position Under Contract	
			6. Proposed Salary		7. Duration of Assignment	
8. Telephone Number (include area code)		9. Place of Birth		10. Citizenship (If non-U.S. citizen, give visa status)		
1. Names, Ages, and Relationship of Dependents to Accompany Individual to Country of Assignment						
12. EDUCATION (include all college or university degrees)				13. LANGUAGE PROFICIENCY		
NAME AND LOCATION OF INSTITUTION	MAJOR	DECREE	DATE	LANGUAGE	Proficiency Speaking	Proficiency Reading
					2/S	2/R
					2/S	2/R
					2/S	2/R
14. EMPLOYMENT HISTORY						
1. Give last three (3) years. List salaries separate for each year. Continue on separate sheet of paper if required to list all employment related to duties of proposed assignment.						
Salary definition – basic periodic payment for services rendered. Exclude bonuses, profit-sharing arrangements, commissions consultant fees, extra or overtime work payments, overseas differential or quarters, cost of living or dependent education allowances.						
POSITION TITLE	EMPLOYER'S NAME AND ADDRESS POINT OF CONTACT & TELEPHONE #		Dates of Employment (mm/dd/yyyy)		Annual Salary	
			From	To	Dollars	
15. SPECIFIC CONSULTANT SERVICES (give last three (3) years)						
SERVICES PERFORMED	EMPLOYER'S NAME AND ADDRESS POINT OF CONTACT & TELEPHONE #		Dates of Employment (mm/dd/yyyy)		Days at Rate	Daily Rate In Dollars
			From	To		
16. CERTIFICATION: To the best of my knowledge, the above facts as stated are true and correct.						
Signature of Employee				Date		
Contractor certifies in submitting this form that it has taken reasonable steps (in accordance with sound business practices) to verify the information contained in this form. Contractor understands that USAID may rely on the accuracy of such information in negotiating and reimbursing personnel under this contract. The making of certifications that are false, fictitious, or fraudulent, or that are based on inadequately verified information, may result in appropriate remedial action by USAID, taking into consideration all of the pertinent facts and circumstances, ranging from refund claims to criminal prosecution.						
Signature of Contractor's Representative					Date	

AID 1420-17 (4/95)

INSTRUCTIONS

Indicate your language proficiency in block 13 using the following numeric interagency Language Roundtable levels (Foreign Service Institute levels). Also, the following provides brief descriptions of proficiency levels 2, 3, 4, and 5. "S" indicates speaking ability and "R" indicates reading ability. For more in-depth description of the levels refer to USAID Handbook 28.

Limited working proficiency

S Able to satisfy routine social demands and limited work requirements.

R Sufficient comprehension to read simple, authentic written material in a form equivalent to usual printing or typescript on familiar subjects.

General professional proficiency

S Able to speak the language with sufficient structural accuracy and vocabulary to participate effectively in most formal and informal conversations.

R Able to read within a normal range of speed and with almost complete comprehension.

Advanced professional proficiency

S Able to use the language fluently and accurately on all levels.

R Nearly native ability to read and understand extremely difficult or abstract prose, colloquialisms and slang.

Functional native proficiency

S Speaking proficiency is functionally equivalent to that of a highly articulate well-educated native speaker.

R Reading proficiency is functionally equivalent to that of the well-educated native reader.

PAPERWORK REDUCTION ACT INFORMATION

The information requested by this form is necessary for prudent management and administration of public funds under USAID contracts. The information helps USAID estimate overseas logistic support and allowances; the educational Information provides an indication of qualifications; the salary information is used as a means of cost monitoring and to Help determine reasonableness of proposed salary.

PAPERWORK REDUCTION ACT NOTICE

Public reporting burden for this collection of information is estimated to average thirty minutes per response, including the Time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and Completing and reviewing the collection of information. Send comments regarding this burden estimate or any other Aspect of this collection of information, including suggestions for reducing this burden, to:

United States Agency for International Development
Procurement Policy Division (M/OP/P)
Washington, DC 20523-1435;
And
Office of Management and Budget
Paperwork Reduction Project (0412-0520)
Washington, DC 20503

AID 1420-17 (4/95) Back

ATTACHMENT 3 – DISCLOSURE OF LOBBYING
ACTIVITIES

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)Approved by OAR
0348-0046

1. Type of Federal Action: <input type="checkbox"/> a. contract <input type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance		2. Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award		3. Report Type: <input type="checkbox"/> a. Initial filing <input type="checkbox"/> b. material change For Material Change Only: year _____ quarter _____ date of last report _____	
4. Name and Address of Reporting Entity: <input type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, if known: Congressional District, if known: _____			5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, if known: _____		
6. Federal Department/Agency:			7. Federal Program Name/Description: CFDA Number, if applicable: _____		
8. Federal Action Number, if known:			9. Award Amount, if known: \$ _____		
10. a. Name and Address of Lobbying Entity (if individual, last name, first name, MI): (attach Continuation Sheet(s) SF-LLL-A, if necessary)			b. Individuals Performing Services (including address if different from No. 10a) (last name, first name, MI): (attach Continuation Sheet(s) SF-LLL-A, if necessary)		
11. Amount of Payment (check all that apply): \$ _____ <input type="checkbox"/> actual <input type="checkbox"/> planned			13. Type of Payment (check all that apply): <input type="checkbox"/> a. retainer <input type="checkbox"/> b. one-time fee <input type="checkbox"/> c. commission <input type="checkbox"/> d. contingent fee <input type="checkbox"/> e. deferred <input type="checkbox"/> f. other: specify: _____		
12. Form of Payment (check all that apply): <input type="checkbox"/> a. cash <input type="checkbox"/> b. in-kind: specify: nature _____ value _____					
14. Brief Description of Services Performed or to be Performed and Date(s) of Service, including officer(s), employee(s), or Member(s) contacted, for Payment Indicated in Item 11: (attach Continuation Sheet(s) SF-LLL-A, if necessary)					
15. Continuation Sheet(s) SF-LLL-A attached: <input type="checkbox"/> Yes <input type="checkbox"/> No					
16. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the law above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.			Signature: _____ Print Name: _____ Title: _____ Telephone No.: _____ Date: _____		
Federal Use Only:			Authorized for Local Reproduction Standard Form - LLL		

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Use the SF-LLL-A Continuation Sheet for additional information if the space on the form is inadequate. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, state and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee", then enter the full name, address, city, state and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, state and zip code of the lobbying entity engaged by the reporting entity identified in item 4 to influence the covered Federal action.
(b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name, and Middle Initial (MI).
11. Enter the amount of compensation paid or reasonably expected to be paid by the reporting entity (item 4) to the lobbying entity (item 10). Indicate whether the payment has been made (actual) or will be made (planned). Check all boxes that apply. If this is a material change report, enter the cumulative amount of payment made or planned to be made.
12. Check the appropriate box(es). Check all boxes that apply. If payment is made through an in-kind contribution, specify the nature and value of the in-kind payment.
13. Check the appropriate box(es). Check all boxes that apply. If other, specify nature.
14. Provide a specific and detailed description of the services that the lobbyist has performed, or will be expected to perform, and the date(s) of any services rendered. Include all preparatory and related activity, not just time spent in actual contact with Federal officials. Identify the Federal official(s) or employee(s) contacted or the officer(s), employee(s), or Member(s) of Congress that were contacted.
15. Check whether or not a SF-LLL-A Continuation Sheet(s) is attached.
16. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

Public reporting burden for this collection of information is estimated to average 30 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, D.C. 20503.

ATTACHMENT 4

CERTIFICATE OF CURRENT COST AND PRICING DATA

This is to certify that, to the best of my knowledge and belief, cost or pricing data (as defined in Section 15.401 of the Federal Acquisition Regulation (FAR) and required under FAR subsection 15.403-4) submitted, either actually or by specific identification in writing, to the Contracting Officer or to the Contracting Officer's representative in support of _____ are accurate, complete, and current as of _____.

**

FIRM: _____

NAME: _____

TITLE: _____

DATE OF EXECUTION: _____

Identify the proposal, quotation, request for price adjustment, or other submission involved, giving the appropriate identifying number (e.g., RFP Number).

** Insert the day, month, and year when price negotiations were concluded and price agreement was reached.

*** Insert the day, month, and year of signing, which should be as close as practicable to the date when price negotiations were concluded and the contract price was agreed to.

ATTACHMENT 5 LIST OF ORGANIZATIONS REQUESTING DOCUMENT

Nancy Baildon, SAIC,Business Opportunity Clearinghouse 10260 Campus Point Dr, MS E2 San Diego, CA 92121-1578	Dr. Adrienne M. McCollum, President Research Assessment Mgt, Inc 8484 Georgia Ave, Suite 1000 Silver Spring, MD 20910-5604	DBA Marie Cardona The Typing Connection 726 Rocklyn Drive San Antonio, TX 78239
Steve Homoki 4200-G Technology Court Chantilly, VA 201151	Attn: Amrit Kalotra Development Training Services, Inc 1449 Woodhurst Boulevard McLean, VA 20101	Dennis Johnson & Company, P.C. 1660 S. Albion Street, Suite 812 Denver, Colorado 80222-4046
Nadra Daly Network Administrator Technical Support Services 1000 Vermont Ave, N.W. Washington D.C. 20005	c/o Augusta O. Inniss JIL Information Systems 612 Ransom Court Odenton, Md. 21113	Elham-Eid Alldredge, Ph.D. REDA International, Inc. 11141 Georgia Avenue, Suite 517 Wheaton, MD 20902-4680
Alexander Short ISTI, Inc. Suite 600 1820 North Fort Myer Drive Arlington, VA 22209	Cathy House, Project Manager TASCON, Inc 1803 Research Blvd. #305 Rockville, MD 20850	Christina Anderson Abt Associates Inc. 55 Wheeler Street Cambridge, Massachusetts 02138-1168
Cynthia A. Moron Nathan Associates Inc. 2101 Wilson Blvd., Suite 1200 Arlington, VA 22201	Dr. Douglas R. Givens, Chief Researcher Documens Archaeology, Incorporated 5029 Country Club Drive High Ridge, Missouri 63049-3509	Charles J. Flagg, President 23010 Lake Forest Drive Suite D-181 Laguna Hills, CA 92653
Gus Benavides, Vice President Sigmatech, Inc 689 Discovery Drive Huntsville, AL 35806	Héctor Márquez Int'l Programs Division IITRI AB Tech Group 1701 N. Beauregard Street Suite 600 Alexandria, VA 22311	Howard A. Raik, President CHP International, Inc. 1040 North Boulevard, Suite 220 Oak Park, IL 60302
SBA		SB
Mr. Jamie Morin J.E. Austin Associates 1911 North Fort Myer Dr. Suite 306 Arlington, VA 22209	Barbara Keating Vice President 11708 Pilgrim Hill Lane Germantown, MD 20876 SB	Karen Cassiday, Firm Administrator Hager Sharp Inc. 1090 Vermont Avenue, NW 3 Flr Washington, DC 20005
Chris Ademiluyi LIB TECH ASSOC., INC. 11350-103 Cherry Hill Rd Beltsville, MD 20705	Martin Arase CPI 3168 Spring Street Fairfax, Va. 22031	Marci Giang Development and Planning Academy for Educational Developmen 1825 Connecticut Avenue, NW Washington, DC 20009

Oliver Clark, Director
CLARK CONSULTANTS, Anderson House
106 Towlson Rd.
McLean, VA 22102

Ms. Payal Tak
Telesis Corporation
1700 Rockville Pike, Suite 400
Rockville, MD 20852

WOSB/SDB/HubZone/8(a)

Stephanie Besch
Business Manager
Stanley Associates, Inc.
300 N. Washington Street, Suite 400
Alexandria, Virginia 22314

Cynthia Pflugh
Corporate Vice President
International Resources Group (IRG)
1211 Connecticut Avenue, NW
Suite 700
Washington, DC 20036

Calvert Wright
Wright Solutions, Inc.
8300 Professional Place, Suite 104
Lanham, MD 20785

Dr. Howell H.W. Mei
Executive Vice President
ATL International, Inc.
20251 Century Blvd. Suite 200
Germantown, MD 20874
8(a)

LaDousca Yvonne Mitchell
Proprietor
AJ & C PROFESSIONAL SERVICES
9511 Foxcroft Avenue
Clinton, MD 20735.

Nick Colin
TONYA, Inc.
1000 Vermont Ave., NW, Suite 500
Washington, DC 20005

Peter Lyon
Hanscomb Inc.
International Construction Consultants
1175 Peachtree Street, NE, Suite 1650
Atlanta, GA 30361

Robert S. Done, Ph.D.
McClelland 405
Department of Mgt and Policy
Eller College of B&P Admin
University of Arizona
Tucson, AZ 85721

Patricia Stec
Program Development Specialist
ASPEN SYSTEMS CORPORATION
2277 Research Blvd., MS-7C
Rockville, MD 20850

Mr. Charles Murphy
Futron Corporation
7315 Wisconsin Ave., Suite 900W
Bethesda, MD 20814

SDB

William H. Wigton, President
Agricultural Assessments International
Corporation
2606 Ritchie-Marlboro Road
Upper Marlboro, Maryland 20772

Deborah Schwarz
Library Associates
8845 West Olympic Blvd, Suite 109
Beverly Hills, CA 90211

Gaby Gibbins
Marketing Representative
8550 Arlington Boulevard
Fairfax, VA 22031

Paul Olkhovsky
Senior Manager for Plans and Program
Delex Systems, Inc.
Courthouse Centre
1953 Gallows Road, Suite 700
Vienna, VA 22182-3991

Robert N. Mowbray
Tropical Forest Ecologist/
Natural Resource Management Specialist
2218 Wheelwright Ct.
Reston, VA 20191-2313

Lee P. Gary, Jr
Strategic Management Services - USA
2837 Carondelet Street
New Orleans, LA 70115

Kim Weber
Federal Sources
8400 Westpark Drive, 4th Floor
McLean, Virginia 22102

Mr. Omar N. Beyah
Beyahtec Corporation
1711 Pebble Beach Drive
Mitchellville, Maryland 20721

SDB

Amber Dobbins
Research Analyst
Stephen J. Bass & Partners, Inc.
4938 Kilconnel Drive
Columbus, Ohio 43221

Suzanne Swenson
Manager
8229 Bone Blvd., Suite 300
Vienna, VA 22182-2623

ATTACHMENT 6**MODEL SMALL BUSINESS/SMALL DISADVANTAGED SUBCONTRACTING PLAN MODEL
SUBCONTRACTING PLAN OUTLINE****Identification Data**

Contractor: _____

Address: _____

Solicitation or Contract Number: _____

Project Title: _____

Total Amount of Contract (Including Options) \$ _____

Period of Contract Performance (MO. & YR.) _____

* Federal Acquisition Regulation (FAR), paragraph 19.708(b) prescribes the use of the clause at FAR 52.219-9 entitled "Small Business, Small Disadvantaged Business, and Women Owned Small Business Subcontracting Plan." The following is a suggested model for use when formulating such subcontracting plan. While this model plan has been designed to be consistent with 52.219-9, other formats of a subcontracting plan may be acceptable. However, failure to include the essential information as exemplified in this model may be cause for either a delay in acceptance or the rejection of a bid or offer where the clause is applicable. Further, the use of this model is not intended to waive other requirements that may be applicable under FAR 52.219-9. "SUBCONTRACT" as used in this clause, means any agreement (other than one involving an employer-employee relationship (entered into a Federal Government prime contractor or subcontractor calling for supplies or services required for performance of the contract or subcontract.

1. Type of Plan (Check One)

____ Individual plan (All elements developed specifically for this contract and applicable for the full term of this contract).

____ Master plan (Goals developed for this contract; all other elements standard; must be renewed annually).

____ Commercial products plan (Contractor sells large quantities of off-the-shelf commodities to many Government agencies. Plans/goals negotiated by a lead agency on a company-wide basis rather than for individual contracts. Plan effective only during year approved. Contractor must provide copy of lead agency approval).

2. Goals

State separate dollar and percentage goals for small business concern, small disadvantaged business concerns, and women-owned small business concerns as subcontractors as specified in FAR 52.219-9 and FAR 19.704(a)(1).

A Total estimated dollar value of all planned subcontracting, i.e., with all types of organizations under this contract, is \$ _____.

B. Total estimated dollar value and percentage of planned subcontracting with small business concerns:
\$ _____ and _____ % *

C. Total estimated dollar value and percentage of planned subcontracting with small disadvantaged business concerns:
\$ _____ and _____ % *

D. Total estimated dollar value and percentage of planned subcontracting with women-owned small business concerns:
\$ _____ and _____ % *
Expressed as a percentage of "A")

E. Total estimated dollar value and percentage of planned subcontracting with HUB Zone small business concerns:
\$ _____ and _____ % *

E. Description of all the products and/or services to be subcontracted under this contract, and an indication of the types of organizations supplying them: (i.e., LARGE BUSINESS (LB), SMALL BUSINESS (SB), SMALL DISADVANTAGED BUSINESS (SDB), AND WOMEN-OWNED SMALL BUSINESS (W-OSB).

(check all that apply)

Subcontracted Product/Service	LB	SB	SDB	W-OSB

(Attach additional sheets if necessary.)

F. A description of the method used to develop the subcontracting goals for small, small disadvantaged, and women-owned small business concerns (i.e., explain the method and state the quantitative basis (in dollars) used to establish the percentage goals; also, explain how the areas to be subcontracted to small, small disadvantaged, and women-owned small business concerns were determined, and how the capabilities of small, small disadvantaged, and women-owned small businesses were determined -- include any source lists used in the determination process).

G. Indirect costs have been _____ have not been _____ included in the dollar and percentage subcontracting goals stated above. (check one)

H. If indirect costs have been included, explain the method used to determine the proportionate share of such costs to be allocated as subcontracts to small business, small disadvantaged business, and women-owned small business concerns.

3. Program Administrator

Name, title, position within the corporate structure, and duties and responsibilities of the employee who will administer the contractor's subcontracting program:

Name: _____

Title: _____

Address: _____

Telephone: _____

Duties: Has general overall responsibility for the contractor's subcontracting program; i.e., developing, preparing, and executing individual subcontracting plans and monitoring performance relative to the requirements of this particular plan. These duties include, but are not limited to, the following activities:

- A. Developing and promoting company-wide policy initiatives that demonstrate the company's support for awarding contracts and subcontracts to small, small disadvantaged, and women-owned small business concerns; assuring that small, small disadvantaged, and women-owned small businesses are included on the source lists for solicitations for products and services for which they are capable of providing;
- B. Developing and maintaining bidder's lists of small, small disadvantaged, and women-owned small business concerns from all possible sources;
- C. Ensuring periodic rotation of potential subcontractors on bidder's lists;
- D. Ensuring that procurement "packages" are designed to permit the maximum possible participation of small, small disadvantaged, and women-owned small businesses;
- E. Making arrangements for the utilization of various sources for the identification of small, small disadvantaged, and women-owned small businesses such as the SBA's Procurement Automated Source System (PASS), the National Minority Purchasing Council Vendor Information Service, the Office of Minority Business Data Center in the Department of Commerce, and the facilities of local small business and minority associations, and maintaining contact with the Federal agency's Small and Disadvantaged Business Utilization Specialist.
- F. Overseeing the establishment and maintenance of contract and subcontract award records;
- G. Attending or arranging for the attendance of company counselors Business Opportunity Workshops, Minority Business Enterprise Seminars, Trade Fairs, Procurement Conferences, etc.;
- H. Ensuring small, small disadvantaged, and women-owned small business concerns are made aware of subcontracting opportunities and of how to prepare responsive bids to the company;
- I. Conducting or arranging for the conduct of training for purchasing personnel regarding the intent and impact of Public Law 95-507 et seq on purchasing procedures;
- J. Monitoring the company's performance and making any adjustments necessary to achieve the Subcontracting Plan goals;
- K. Preparing and submitting timely, required Subcontracting Reports, including SF 294 and SF 295;

L. Coordinating the company's activities during the conduct of compliance reviews by Federal agencies; and,

M. Other duties:

4. Equitable Opportunity

Describe efforts the offeror will make to ensure that small, small disadvantaged, and women-owned small business concerns will have an equitable opportunity to compete for subcontracts. These efforts include, but are not limited to the following activities:

A. Outreach efforts to obtain sources:

1. Contacting minority and small business trade association;
2. Contacting business development organizations;
3. Attending small and minority business procurement conferences and trade fairs; and
4. Requesting sources from the Small Business Administration's Procurement Automated Source System (PASS).
5. Placing newspaper and magazine ads, which encourage new sources.

B. Internal efforts to guide and encourage purchasing personnel:

1. Presenting workshops, seminars, and training programs;
2. Establishing, maintaining, and using small, disadvantaged, and women-owned small businesses source lists, guides, and other data for soliciting subcontracts; and
3. Monitoring activities to evaluate compliance with the Subcontracting Plan.

C. Additional efforts: _____

5. Flow-Down Clause

The contractor agrees to include the provisions under FAR 52.219-8, "Utilization of Small Business Concerns, Small Disadvantaged Business Concerns, and Women-Owned Small Business Concerns", in all subcontracts that offer further subcontracting opportunities. All subcontractors, except small business concerns, that receive subcontracts in excess of \$500,000 (\$1,000,000 for construction) must adopt and comply with a plan similar to the plan required by FAR 52.219-9, "Small Business, Small Disadvantaged Business, and Women-Owned Small Business Subcontracting Plan." Ref. FAR 19.704 (a) (4)

6. Reporting and Cooperation

The contractor gives assurance of (1) cooperation in any studies or surveys that may be required; (2) submission of periodic reports which show compliance with the Subcontracting Plan; (3) submission of Standard Form SF 294, "Subcontracting Report for Individual Contracts," and SF 295, "Summary Subcontract Report," in accordance with the instructions on the forms; and (4) ensuring that subcontractors agree to submit SF 294 and SF 295.

Reporting Period	Report Due	Due
Oct 1 - Mar 31	SF 294	04/30
Apr 1 - Sep 30	SF 294	10/30
Oct 1 - Sep 30	SF 295	10/30

ADDRESSES

(a) SF 294 and

(b) SF 295 to be submitted to:

Director
Office of Small and Disadvantaged Business
Utilization/Minority Resource Center
U.S. Agency for International Development
Washington, DC 20523-1414

7. Record-keeping

The following is a recitation of the types of records the contractor will maintain to demonstrate the procedures adopted to comply with the requirements and goals in the Subcontracting Plan. These records will include, but not be limited to, the following:

A. Small, small disadvantaged, and women-owned small business concerns source lists, guides, and other data identifying such vendors;

B. Organizations contacted in an attempt to locate small, small disadvantaged, and women-owned small business sources;

C. On a contract-by-contract basis, records on all subcontract solicitations over \$100,000 which indicate for each solicitation (1) whether small business concerns were solicited, and if not, why not; (2) whether small disadvantaged business concerns were solicited, and if not, why not; (3) whether women-owned small business concerns were solicited, and if not, why not; and (4) reason for the failure of solicited small, small disadvantaged, or women-owned small business concerns to receive the subcontract award;

D. Records to support other outreach efforts, e.g., contacts with minority and small business trade associations, attendance at small and minority business procurement conferences and trade fairs;

E. Records to support internal guidance and encouragement provided buyers through (1) workshops, seminars, training programs, incentive awards; and (2) monitoring of activities to evaluate compliance; and

F. On a contract-by-contract basis, records to support subcontract data including the name, address, and business size of each subcontractor. (This item is not required for company or division-wide commercial products plans.)

G. Additional records: _____

This subcontracting plan was submitted by:

Signature: _____

Typed Name: _____

Title: _____

Date Prepared: _____

Phone No.: _____

ATTACHMENT 7**EXHIBITS FOR DEVELOPMENT INFORMATION SERVICE (DIS)**

They are located at <http://www.dec.org/dis-rfp-mop-00-1518/> and consist of the following items:

1. PPC/CDIE/DIO Development Information Services "Using Knowledge for Change". (MS Powerpoint Presentation)
2. Research and Reference Service (R&RS) 1999 Annual Report. (MS Word Document)
3. Economic and Social Data Services (ESDS) 1999 Annual Performance Report. (MS Word Document)
4. USAID Library web site. (<http://library.info.usaid.gov/>).
5. R&RS Requests & Responses, v.5, no. 3 (http://cdie.usaid.gov/pdf_docs/rrs5-3.pdf)
6. "Poverty Reduction and Aid" R&RS Information Memorandum. (MS Word Document)
7. "Agricultural Finance in Africa" Bibliography. (MS Word Document)
8. R&RS Research Paper: "U.S. Foundations: A Review of International Funding Priorities". (http://www.dec.org/pdf_docs/PNACG896.pdf)
9. R&RS Research Paper "Women, War and Displacement in Georgia". (http://www.dec.org/pdf_docs/PNACF180.pdf)
10. R&RS Research Paper: "Women's Organizations During and After War: From Service Delivery to Policy Advocacy". (http://www.dec.org/pdf_docs/PNACD336.pdf)
11. R&RS Internet Bookmark Bibliography "Internet resources on conflict management, prevention and resolution". (http://www.dec.org/pdf_docs/PNACH194.pdf)
12. Africa Bureau Information Center (ABIC). (<http://www.usaid.gov/regions/afr/abic/>)
13. African Voices Newsletter. (<http://www.usaid.gov/regions/afr/abic/avindex.htm>)
14. SD Abstracts. (<http://www.usaid.gov/regions/afr/abic/absindex.htm>)
15. SD Developments. (<http://www.usaid.gov/regions/afr/abic/sddindex.htm>)
16. Asia Near East Bureau External Website. (<http://www.usaid.gov/regions/ane/>)
17. Center for Democracy and Governance (G/DG) External Website. (<http://www.usaid.gov/democracy/center/index.html>)
18. Leland Initiative. (<http://www.usaid.gov/regions/afr/leland/>)
19. ESDS Project Brochure. (MS Word Document)
20. Latin America and the Caribbean Data Book. (<http://www.usaid.gov/regions/lac/files/index.html>)
21. Global Education Database. (http://www.usaid.gov/educ_training/ged.htm)
22. US Merchandise Trade with Developing Countries. (http://www.usaid.gov/economic_growth/trdweb/)

[END OF SECTION J]

PART IV - REPRESENTATIONS AND INSTRUCTIONS**SECTION K - REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF OFFERORS****K.1 52.203-2 CERTIFICATE OF INDEPENDENT PRICE****DETERMINATION (APR 1985)**

(a) The offeror certifies that—

- (1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to (i) those prices, (ii) the intention to submit an offer, or (iii) the methods or factors used to calculate the prices offered;
- (2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and
- (3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory—

- (1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or
- (2) (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above

[Insert full name of person(s) in the offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the offeror's organization];

- (ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) above have not participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above; and
- (iii) As an agent, has not personally participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above.

(c) If the offeror deletes or modifies subparagraph (a)(2) above, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

[End of Provision]

K.2 52.203-11 CERTIFICATION AND DISCLOSURE REGARDING PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS (APR 1991)

(a) The definitions and prohibitions contained in the clause, at FAR 52.203-12, Limitation on Payments to Influence Certain Federal Transactions, included in this solicitation, are hereby incorporated by reference in paragraph (b) of this certification.

(b) The offeror, by signing its offer, hereby certifies to the best of his or her knowledge and belief that on or after December 23, 1989--

- (1) No Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement;
- (2) If any funds other than Federal appropriated funds (including profit or fee received under a covered Federal transaction) have been paid, or will be paid, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with this solicitation, the offeror shall complete and submit, with its offer, OMB standard form LLL, Disclosure of Lobbying Activities, to the Contracting Officer; and
- (3) He or she will include the language of this certification in all subcontract awards at any tier and require that all recipients of subcontract awards in excess of \$100,000 shall certify and disclose accordingly.

(c) Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by section 1352, title 31, United States Code. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure form to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

K.3 52.204-3 TAXPAYER IDENTIFICATION (OCT 1998)

(a) Definitions.

“Common parent,” as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member.

“Taxpayer Identification Number (TIN),” as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security Number or an Employer Identification Number.

- (b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to comply with debt collection requirements of 31 U.S.C. 7701© and 3325(d), reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting contract is subject to the payment reporting requirements described in Federal Acquisition Regulation (FAR) 4.904, the failure or refusal by the offeror to furnish the information may result in a 31 percent reduction of payments otherwise due under the contract.
- (c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out of the offeror’s relationship with the Government (31 U.S.C. 7701©(3)). If the resulting contract is subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may be matched with IRS records to verify the

(d) Taxpayer Identification Number (TIN).

☐ TIN:_____.☐ TIN has been applied for.☐ TIN is not required because:☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States;☐ Offeror is an agency or instrumentality of a foreign government;☐ Offeror is an agency or instrumentality of the Federal Government.

(e) Type of organization.

☐ Sole proprietorship;☐ Partnership;☐ Corporate entity (not tax-exempt);☐ Corporate entity (tax-exempt);☐ Government entity (Federal, State, or local);☐ Foreign government;☐ International organization per 26 CFR 1.6049-4;☐ Other_____.

(f) Common parent.

☐ Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this provision.☐ Name and TIN of common parent:

Name _____

TIN _____

K.4 52.204-5 WOMEN-OWNED BUSINESS (OTHER THAN SMALL BUSINESS) (MAY 1999)

(a) Definition. Women-owned business concern, as used in this provision, means a concern that is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.

(b) Representation. [Complete only if the offeror is a women-owned business concern and has not represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business Program Representations, of this solicitation.]

The offeror represents that it ☐ is a women-owned business concern.

K.5 52.209-5 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS (MAR 1996)

(A) (1) The Offeror certifies, to the best of its knowledge and belief, that—

(i) The Offeror and/or any of its Principals—

(A) Are () are not () presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(B) Have () have not (), within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

(C) Are () are not () presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in subdivision (A)(1)(i)(B) of this provision. (ii) The Offeror has () has not (), within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency. (2) “Principals,” for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

THIS CERTIFICATION CONCERNS A MATTER WITHIN THE JURISDICTION OF AN AGENCY OF THE UNITED STATES AND THE MAKING OF A FALSE, FICTITIOUS, OR FRAUDULENT CERTIFICATION MAY RENDER THE MAKER SUBJECT TO PROSECUTION UNDER SECTION 1001, TITLE 18, UNITED STATES CODE.

- (b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror’s responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.
- (d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- (e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

[End of Provision]

K.6 52.215-6 PLACE OF PERFORMANCE (OCT 1997)

- (a) The offeror or respondent, in the performance of any contract resulting from this solicitation, ☐ intends, ☐ does not intend [check applicable block] to use one or more plants or facilities located at a different address from the address of the offeror or respondent as indicated in this proposal or response to request for information.
- (b) If the offeror or respondent checks “intends” in paragraph (a) of this provision, it shall insert in the following spaces the required information:

Place of Performance (Street Name and Address of Owner and Address, City, State, County, Operator of the Plant or Zip Code) Facility if Other than Offeror or Respondent

_____	_____
_____	_____
_____	_____
_____	_____

K.7 52.219-1 SMALL BUSINESS PROGRAM REPRESENTATIONS (MAY 1999)

- (a) (1) The standard industrial classification (SIC) code for this acquisition is 7379.
- (2) The small business size standard is \$18.0 million average annual receipts for an offeror’s last 3 fiscal years.
- (3) The small business size standard for a concern which submits an offer in its own name, other than on a construction or service contract, but which proposes to furnish a product which it did not itself manufacture, is 500 employees.
- (b) Representations.
- (1) The offeror represents as part of its offer that it ☐ is, ☐ is not a small business concern.
- (2) [Complete only if the offeror represented itself as a small business concern in paragraph (b)(1) of this provision.] The offeror represents, for general statistical purposes, that it ☐ is, ☐ is not, a small disadvantaged business concern as defined in 13 CFR 124.1002.
- (3) [Complete only if the offeror represented itself as a small business concern in paragraph (b)(1) of this provision.] The offeror represents as part of its offer that it ☐ is, ☐ is not a women-owned small business concern.
- (c) Definitions.

“Small business concern,” as used in this provision, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria in 13 CFR Part 121 and the size standard in paragraph (a) of this provision. “Women-owned small business concern,” as used in this provision, means a small business concern—(1) Which is at least 51 percent owned by one or more women or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and (2) Whose management and daily business operations are controlled by one or more women.

(d) Notice.

- (1) If this solicitation is for supplies and has been set aside, in whole or in part, for small business concerns, then the clause in this solicitation providing notice of the set-aside contains restrictions on the source of the end items to be furnished.
- (2) Under 15 U.S.C. 645(d), any person who misrepresents a firm's status as a small, small disadvantaged, or women-owned small business concern in order to obtain a contract to be awarded under the preference programs established pursuant to section 8(a), 8(d), 9, or 15 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall—
 - (i) Be punished by imposition of fine, imprisonment, or both;
 - (ii) Be subject to administrative remedies, including suspension and debarment; and
 - (iii) Be ineligible for participation in programs conducted under the authority of the Act.

K.8 52.222-22 PREVIOUS CONTRACTS AND COMPLIANCE REPORTS (FEB 1999)

The offeror represents that—

- (a) It [] has, [] has not participated in a previous contract or subcontract subject to the Equal Opportunity clause of this solicitation;
- (b) It [] has, [] has not filed all required compliance reports; and
- (c) Representations indicating submission of required compliance reports, signed by proposed subcontractors, will be obtained before subcontract awards.

K.9 52.222-25 AFFIRMATIVE ACTION COMPLIANCE (APR 1984)

The offeror represents that

- (a) It [] has developed and has on file, [] has not developed and does not have on file, at each establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor (41 CFR 60-1 and 60-2); or
- (b) It [] has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

K.10 52.223-1 CLEAN AIR AND WATER CERTIFICATION (APR 1984)

The Offeror certifies that—

- (a) Any facility to be used in the performance of this proposed contract is [], is not [] listed on the Environmental Protection Agency (EPA) List of Violating Facilities;
- (b) The Offeror will immediately notify the Contracting Officer, before award, of the receipt of any communication from the Administrator, or a designee, of the EPA, indicating that any facility that the Offeror proposes to use for the performance of the contract is under consideration to be listed on the EPA List of Violating Facilities; and
- (c) The Offeror will include a certification substantially the same as this certification, including this paragraph ©, in every nonexempt subcontract.

[End of Provision]

K.11 52.226-2 HISTORICALLY BLACK COLLEGE OR UNIVERSITY AND MINORITY INSTITUTION REPRESENTATION (MAY 1997)

- (a) Definitions. As used in this provision—Historically Black College or University means an institution determined by the Secretary of Education to meet the requirements of 34 CFR 608.2. For the Department of Defense, the National Aeronautics and Space Administration, and the Coast Guard, the term also includes any nonprofit research institution that was an integral part of such a college or university before November 14, 1986.

Minority Institution means an institution of higher education meeting the requirements of Section 1046(3) of the Higher Education Act of 1965 (20 U.S.C. 1135d-5(3)) which, for the purpose of this provision, includes a Hispanic-serving institution of higher education as defined in Section 316(b)(1) of the Act (20 U.S.C. 1059c(b)(1)).(b) Representation. The offeror represents that it—

- ☐ is ☐ is not a Historically Black College or University;
☐ is ☐ is not a Minority Institution.

K.12 52.227-15 REPRESENTATION OF LIMITED RIGHTS DATA AND RESTRICTED COMPUTER SOFTWARE (MAY 1999)

- (a) This solicitation sets forth the work to be performed if a contract award results, and the Government's known delivery requirements for data (as defined in FAR 27.401). Any resulting contract may also provide the Government the option to order additional data under the Additional Data Requirements clause at 52.227-16 of the FAR, if included in the contract. Any data delivered under the resulting contract will be subject to the Rights in Data—General clause at 52.227-14 that is to be included in this contract. Under the latter clause, a Contractor may withhold from delivery data that qualify as limited rights data or restricted computer software, and deliver form, fit, and function data in lieu thereof. The latter clause also may be used with its Alternates II and/or III to obtain delivery of limited rights data or restricted computer software, marked with limited rights or restricted rights notices, as appropriate. In addition, use of Alternate V with this latter clause provides the Government the right to inspect such data at the Contractor's facility.
- (b) As an aid in determining the Government's need to include Alternate II or Alternate III in the clause at 52.227-14, Rights in Data—General, the offeror shall complete paragraph © of this provision to either state that none of the data qualify as limited rights data or restricted computer software, or identify, to the extent feasible, which of the data qualifies as limited rights data or restricted computer software. Any identification of limited rights data or restricted computer software in the offeror's response is not determinative of the status of such data should a contract be awarded to the offeror.
- (c) The offeror has reviewed the requirements for the delivery of data or software and states (offeror check appropriate block)--

☐ None of the data proposed
 for fulfilling such requirements
 qualifies as limited rights data or
 restricted computer software.

☐ Data proposed for fulfilling
 such requirements qualify as
 limited rights data or restricted computer
 software and are identified as follows:

NOTE: "Limited rights data" and "Restricted computer software" are defined in the contract clause entitled "Rights In Data—General."

K.13 752.226-1 DISADVANTAGED ENTERPRISE REPRESENTATION (APR 1991)

The offeror/contractor shall submit a representation in the following form to the contracting officer:

(a) Representation. The offeror represents that:

- (1) It [] is, [] is not a small disadvantaged business.
- (2) It [] is, [] is not an historically black college or university, as designated by the Secretary of Education pursuant to 34 CFR 608.2.
- (3) It [] is, [] is not a college or university having a student body in which more than 40 percent of the students are Hispanic American.
- (4) It [] is, [] is not a private voluntary organization which is controlled by individuals who are socially and economically disadvantaged.

(b) Definitions.

- (1) "Asian Pacific Americans," as used in this provision means United States citizens whose origins are in Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the U.S. Trust Territory of the Pacific Islands (Republic of Palau), the Northern Mariana Islands, Laos, Kampuchea (Cambodia), Taiwan, Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Republic of the Marshall Islands, or the Federated States of Micronesia.
- (2) "Controlled by socially and economically disadvantaged individuals" means management and daily business are controlled by one or more such individuals.
- (3) "Native Americans," as used in this provision means American Indians, Eskimos, Aleuts, and native Hawaiians.
- (4) "Owned by socially and economically disadvantaged individuals" means at least 51 percent owned by one or more individuals who are both socially and economically disadvantaged, or a publicly owned business having at least 51 percent of its stock owned by one or more socially and economically disadvantaged individuals.
- (5) "Small business concern," as used in this provision, means a U.S. concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualifies as a small business under the criteria and size standards in 13 CFR 121.
- (6) "Small disadvantaged business," as used in this provision, means a small business concern that:
 - (i) Is at least 51 percent owned by one or more individuals who are both socially and economically disadvantaged, or a publicly owned business having at least 51 percent of its stock owned by one or more socially and economically disadvantaged individuals; and
 - (ii) Has its management and daily business controlled by one or more such individuals.
- (7) "Subcontinent Asian Americans," as used in this provision, means United States citizens whose origins are in India, Pakistan, Bangladesh, Sri Lanka, Bhutan, or Nepal.

(d) Qualified groups. The offeror shall presume that socially and economically disadvantaged individuals include Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Subcontinent Asian Americans, and women.

[End of Provision]

K.14 INSURANCE - IMMUNITY FROM TORT LIABILITY

The offeror represents that it [] is, [] is not a State agency or charitable institution, and that it [] is not immune, [] is partially immune, [] is totally immune from tort liability to third persons.

[End of Provision]

K.15 AGREEMENT ON, OR EXCEPTIONS TO, TERMS AND CONDITIONS

The Offeror has reviewed the solicitation (Sections B through J of which will become the contract) and [] agrees to the terms and conditions set forth therein; or [] has the following exceptions (continue on a separate attachment page, if necessary):

[End of Provision]

K.16 SIGNATURE

By signature hereon, or on an offer incorporating these Representations, Certifications, and Other Statements of Offerors, the offeror certifies that they are accurate, current, and complete, and that the offeror is aware of the penalty prescribed in 18 U.S.C. 1001 for making false statements in offers.

SECTION L - INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS**L.1 52.252-1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)**

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this/these address(es):

<http://www.arnet.gov/far>
<http://www.info.usaid.gov>

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) PROVISIONS

NUMBER	TITLE	DATE
52.204-6	DATA UNIVERSAL NUMBERING SYSTEM (DUNS) NUMBER	JUN 1999
52.214-34	SUBMISSION OF OFFERS IN THE ENGLISH LANGUAGE	APR 1991
52.207-2	NOTICE OF COST COMPARISON (NEGOTIATED)	FEB 1993
52.214-35	SUBMISSION OF OFFERS IN US CURRENCY	APR 1991
52.215-16	FACILITIES CAPITAL COST OF MONEY	OCT 1997
52.219-24	SDB PARTICIPATION PROGRAM	JAN 1999
52.222-24	PREAWARD ON-SITE EQUAL OPPORTUNITY COMPLIANCE REVIEW	APR 1984
52.222-46	EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES	FEB 1993
52.232-13	NOTICE OF PROGRESS PAYMENTS	APR 1984
52.237-10	IDENTIFICATION OF UNCOMPENSATED OVERTIME	OCT 1997
52.252-3	ALTERATIONS IN SOLICITATION	APR 1984

[End of Provision]

L.2 52.215-1 INSTRUCTIONS TO OFFERORS -- COMPETITIVE ACQUISITION (OCT 1997)

(a) Definitions: As used in this provision—

“Discussions” are negotiations that occur after establishment of the competitive range that may, at the Contracting Officer’s discretion, result in the offeror being allowed to revise its proposal.

“In writing” or “written” means any worded or numbered expression, which can be read, reproduced, and later communicated, and includes electronically transmitted and stored information.

“Proposal modification” is a change made to a proposal before the solicitation’s closing date and time, or made in response to an amendment, or made to correct a mistake at any time before award.

“Proposal revision” is a change to a proposal made after the solicitation closing date, at the request of or as allowed by a Contracting Officer as the result of negotiations.

“Time”, if stated as a number of days, is calculated using calendar days, unless otherwise specified, and will include Saturdays, Sundays, and legal holidays. However, if the last day falls on a Saturday, Sunday, or legal holiday, then the period shall include the next working day.

(1) Amendments to solicitations. If this solicitation is amended, all terms and conditions that are not amended remain unchanged. Offerors shall acknowledge receipt of any amendment to this

solicitation by the date and time specified in the amendment(s).

(2) Submission, modification, revision, and withdrawal of proposals.

- (i) Unless other methods (e.g., electronic commerce or facsimile) are permitted in the solicitation, proposals and modifications to proposals shall be submitted in paper media in sealed envelopes or packages addressed to the office specified in the solicitation, and (ii) showing the time and date specified for receipt, the solicitation number, and the name and address of the offeror. Offerors using commercial carriers should ensure that the proposal is marked on the outermost wrapper with the information in paragraphs ©(1)(i) and ©(1)(ii) of this provision.

(ii) The first page of the proposal must show—

- (A) The solicitation number;
- (B) The name, address, and telephone and facsimile numbers of the offeror (and electronic address if available);
- (C) A statement specifying the extent of agreement with all terms conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item;
- (D) Names, titles, and telephone and facsimile numbers (and electronic addresses if available) of persons authorized to negotiate on the offeror's behalf with the Government in connection with this solicitation; and
- (E) Name, title, and signature of person authorized to sign the proposal. Proposals signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the issuing office.

(3) Late proposals and revisions.

- (i) Any proposal received at the office designated in the solicitation after the exact time specified for receipt of offers will not be considered unless it is received before award is made and—

- (A) It was sent by registered or certified mail not later than the fifth calendar day before the date specified for receipt of offers (e.g., an offer submitted in response to a solicitation requiring receipt of offers by the 20th of the month must have been mailed by the 15th);
- (B) It was sent by mail (or telegram or facsimile, if authorized) or hand-carried (including delivery by a commercial carrier) if it is determined by the Government that the late receipt was due primarily to Government mishandling after receipt at the Government installation;
- (C) It was sent by U.S. Postal Service Express Mail Next Day Service-Post Office to Addressee, not later than 5:00 p.m. at the place of mailing two working days prior to the date specified for receipt of proposals. The term "working days" excludes weekends and U.S. Federal holidays;
- (D) It was transmitted through an electronic commerce method authorized by the solicitation and was received at the initial point of entry to the Government infrastructure not later than 5:00 p.m. one working day prior to the date specified for receipt of proposals; or
- (E) There is acceptable evidence to establish that it was received at the activity designated for receipt of offers and was under the Government's control prior to the time set for receipt of offers, and the Contracting Officer determines that accepting the late offer would not unduly delay the procurement; or
- (F) It is the only proposal received.

- (ii) Any modification or revision of a proposal or response to request for information, including any final proposal revision, is subject to the same conditions as in subparagraphs (C)(3)(i)(A) through (c)(3)(i)(E) of this provision.

- (iii) The only acceptable evidence to establish the date of mailing of a late proposal or modification or revision sent either by registered or certified mail is the U.S. or Canadian Postal Service postmark both on the envelope or wrapper and on the original receipt from the U.S. or Canadian Postal Service. Both postmarks must show a legible date or the

proposal, response to a request for information, or modification or revision shall be processed as if mailed late. "Postmark" means a printed, stamped, or otherwise placed impression (exclusive of a postage meter machine impression) that is readily identifiable without further action as having been supplied and affixed by employees of the U.S. or Canadian Postal Service on the date of mailing. Therefore, offerors or respondents should request the postal clerk to place a legible hand cancellation bull's eye postmark on both the receipt and the envelope or wrapper.

- (iv) Acceptable evidence to establish the time of receipt at the Government installation includes the time/date stamp of that installation on the proposal wrapper, other documentary evidence of receipt maintained by the installation, or oral testimony or statements of Government personnel.
 - (v) The only acceptable evidence to establish the date of mailing of a late offer, modification or revision, or withdrawal sent by Express Mail Next Day Service-Post Office to Addressee is the date entered by the post office receiving clerk on the "Express Mail Next Day Service-Post Office to Addressee" label and the postmark on both the envelope or wrapper and on the original receipt from the U.S. Postal Service. "Postmark" has the same meaning as defined in paragraph (C) (3)(iii) of this provision, excluding postmarks of the Canadian Postal Service. Therefore, offerors or respondents should request the postal clerk to place a legible hand cancellation bull's eye postmark on both the receipt and the envelope or wrapper.
 - (vi) Notwithstanding paragraph (C)(3)(i) of this provision, a late modification or revision of an otherwise successful proposal that makes its terms more favorable to the Government will be considered at any time it is received and may be accepted.
 - (vii) Proposals may be withdrawn by written notice or telegram (including mailgram) received at any time before award. If the solicitation authorizes facsimile proposals, proposals may be withdrawn via facsimile received at any time before award, subject to the conditions specified in the provision entitled "Facsimile Proposals." Proposals may be withdrawn in person by an offeror or an authorized representative, if the representative's identity is made known and the representative signs a receipt for the proposal before award.
 - (viii) If an emergency or unanticipated event interrupts normal Government processes so that proposals cannot be received at the office designated for receipt of proposals by the exact time specified in the solicitation, and urgent Government requirements preclude amendment of the solicitation or other notice of an extension of the closing date, the time specified for receipt of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal Government processes resume. If no time is specified in the solicitation, the time for receipt is 4:30 p.m., local time, for the designated Government office.
- (4) Unless otherwise specified in the solicitation, the offeror may propose to provide any item or combination of items.
 - (5) Proposals submitted in response to this solicitation shall be in English and in U.S. dollars, unless otherwise permitted by the solicitation.
 - (6) Offerors may submit modifications to their proposals at any time prior to award and may submit modifications in response to an amendment, or to correct a mistake at any time before award.
 - (7) Offerors may submit revised proposals only if requested or allowed by the Contracting Officer.
 - (8) Proposals may be withdrawn at any time before award. Withdrawals are effective upon receipt of notice by the Contracting Officer.
- (a) Offer expiration date. Proposals in response to this solicitation will be valid for the number of days specified on the solicitation cover sheet (unless a different period is proposed by the offeror).
 - (b) Restriction on disclosure and use of data. Offerors that include in their proposals data that they do not want disclosed to the public for any purpose, or used by the Government except for evaluation purposes, shall—

- (1) Mark the title page with the following legend: This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of—or in connection with—the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets]; and
- (2) Mark each sheet of data it wishes to restrict with the following legend: Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.

(f) Contract award.

- (1) The Government intends to award a contract or contracts resulting from this solicitation to the responsible offeror(s) whose proposal(s) represents the best value after evaluation in accordance with the factors and sub factors in the solicitation.
- (2) The Government may reject any or all proposals if such action is in the Government's interest.
- (3) The Government may waive informalities and minor irregularities in proposals received.
- (4) The Government intends to evaluate proposals and award a contract without discussions with offerors (except clarifications as described in FAR 15.306(a)). Therefore, the offeror's initial proposal should contain the offeror's best terms from a cost or price and technical standpoint. The Government reserves the right to conduct discussions if the Contracting Officer later determines them to be necessary. If the Contracting Officer determines that the number of proposals that would otherwise be in the competitive range exceeds the number at which an efficient competition can be conducted, the Contracting Officer may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals.
- (5) The Government reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the offeror specifies otherwise in the proposal.
- (6) The Government reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the Government's best interest to do so.
- (7) Exchanges with offerors after receipt of a proposal do not constitute a rejection or counteroffer by the Government.
- (8) The Government may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or sub line items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price Analyst techniques. A proposal may be rejected if the Contracting Officer determines that the lack of balance poses an unacceptable risk to the Government.
- (9) If a cost realism Analyst is performed, cost realism may be considered by the source selection authority in evaluating performance or schedule risk.
- (10) A written award or acceptance of proposal mailed or otherwise furnished to the successful offeror within the time specified in the proposal shall result in a binding contract without further action by either party.
- (11) The Government may disclose the following information in post award debriefings to other offerors:
 - (i) The overall evaluated cost or price and technical rating of the successful offeror;
 - (ii) The overall ranking of all offerors, when any ranking was developed by the agency during source selection;
 - (iii) A summary of the rationale for award; and
 - (iv) For acquisitions of commercial items, the make and model of the item to be delivered by the successful offeror.

L.3 GENERAL INFORMATION

(a) Government Obligation: The US Government is not obligated to make an award or to pay for any cost incurred by the offeror in preparation of a proposal in response hereto.

(b) Freedom of Information Act of 1981: Pursuant to this Act, the public is entitled to request information from Agency contract files. As a general rule, information will be disclosed except:

1. Information submitted in response to a Request for Proposal, prior to award of the contract or other instrument, or amendments thereto.
2. Information properly classified or administratively controlled by the Government.
3. Information specifically exempted from disclosure under the Freedom of Disclosure Act.

Upon award of contracts resulting from this solicitation, the Government will disclose, use or duplicate any information submitted in response to the solicitation to the extent provided in the contract and as required by the Freedom of Information Act.

(c) In case of any disagreements or discrepancies between the terms and conditions of this RFP and the FAR, the latter shall prevail.

(d) The Offeror shall follow the instructions contained in this RFP and supply all information and signatures/certifications, as required. Failure to furnish all information requested may disqualify a proposal. The penalty for making false statements to the Government is prescribed in 18 U.S. C. 1001.

(e) Pre-Award Surveys: USAID reserves the right to perform a pre-award survey which may include, but is not limited to: (1) interviews with individuals to establish their ability to perform contract duties under the project conditions; (2) a review of the Offeror's financial condition, business and personnel procedures, etc.; and (3) site visits to the Offeror's institution.

(f) This request for proposals is written in the Uniform Contract Format described in Federal Acquisition Regulation (FAR) section 15.204. Offerors are encouraged to familiarize themselves with the Uniform Contract Format. This will facilitate their understanding of the terms and conditions of this solicitation, the instructions, which follow, and the source selection process. If an offeror does not understand these instructions, then it should write to the Contracting Officer for clarification sufficiently in advance of the deadline for the receipt of proposals.

L.4 INSTRUCTIONS FOR PREPARATION OF PROPOSALS AND OTHER REQUIRED INFORMATION

The offeror shall follow the instructions contained herein and supply all information as required. Failure to furnish all information requested may disqualify a proposal.

[Note 1: The information required under L.4 (c) (1) Item No. 1 below must be submitted separately (Identified as "Written Institutional Capability") from the information required under L.4 (c) (1) Item No. 2 and 3 below (Senior Level Personnel Resumes and Past Performance").

[Note 2: Offerors are reminded to submit only the information specifically required by this RFP. Any additional information will be removed prior to submission to the technical panel.]

Complete proposals packages must be submitted for the requirements in section L.4 (c) (1) *CONTENTS OF PROPOSAL* below. **Proposal shall be unbound, secured by clamps or paper clips only.**

L.4 (a) Receipt of Proposal and Acceptance Period: Proposals must be received by the closing date and time indicated in Block 9 of the Cover Page (SF33) of this solicitation. Proposals must remain available for acceptance by USAID for a minimum of 180 days. **Telegraphic or facsimile proposals will not be accepted.**

L.4 (b) Preparation of Proposal: The offeror is requested to submit a proposal directly responsive to the terms, conditions, specifications and clauses of this solicitation. The complete submission of all requested items will constitute your offer. The offeror must propose for the entire requirement; proposals for only portions of the requirement will not be accepted.

L.4 (c) Instructions for the Preparation of Cost Proposal Budget with Assumptions and Budget Instructions. The format for the submission of the cost proposal is provided in section J, attachment nine (9).

- 1 All DIS contract staff should be budgeted as Full-time Equivalents (2080 hours per year which includes 80 hours per year vacation time) unless otherwise specified in the scope of work. All annual costs estimates shall include estimated annual inflation costs. All Other Direct Costs (ODCs) listed below are unloaded (exclusive of indirect costs, G&A, etc.).
- 2 Section C. Introductory Paragraph, DIS Project Director. Other Direct Costs should be estimated at \$10,000 per year to include travel, meeting expenses, supplies and miscellaneous costs.
3. Section C.1.1. USAID Library Resources. Other Direct Costs (ODCs) should be estimated at \$29,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$100,000 per year for the annual library acquisitions budget for purchase of books, journals, newspapers, references, CD-ROMS, databases and other periodicals, and \$6,000 per year for annual SIRSI Unicorn STILAS software maintenance and help-desk support.
4. Section C.2.1. Learning Resources Center (LRC). Other Direct Costs (ODCs) should be estimated at \$7,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
5. Section C.2.1. Development Research Service. Other Direct Costs (ODCs) should be estimated at \$55,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
6. Section C.2.1.i.1. Bureau Research Analysts. Other Direct Costs (ODCs) should be estimated at \$30,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
7. C.2.1.i.2. Africa Bureau Information Center (ABIC). Other Direct Costs (ODCs) should be estimated at \$55,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$5,000 per year for the annual library acquisitions budget for purchase of books, journals, newspapers, references, CD-ROMS, databases and other periodicals.
8. C.2.1.i.3. ANE Bureau Specialized Research Operations. Other Direct Costs (ODCs) should be estimated at \$65,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
9. C.2.1.i.4. G/DG Center Information Unit (CIU). Other Direct Costs (ODCs) should be estimated at \$140,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$10,000 per year for the annual library acquisitions budget for purchase of books, journals, newspapers, references, CD-ROMS, databases and other periodicals.

10. C.2.1.i.5. PPC/DP Senior Research Analyst. Other Direct Costs (ODCs) should be estimated at \$5,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
11. C.2.2. Development Statistics Service. Other Direct Costs (ODCs) should be estimated at \$20,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$12,000 per year for the annual acquisitions budget for purchase of statistical publications and statistical data subscriptions, and \$8,000 per year for annual computer services support for GED-Database CDROM software development.
12. C.2.2.i. Specialized Development Statistics Services Activities. Other Direct Costs (ODCs) should be estimated at \$30,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$1,000 per year for the annual acquisitions budget for purchase of statistical publications and statistical data subscriptions.
13. C.3. DIS Knowledge Sharing Team. Other Direct Costs (ODCs) should be estimated at \$43,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, training supplies and miscellaneous costs. Additional ODCs shall include \$2,000 per year for the annual acquisitions budget for purchase of training materials, books, references, CD-ROMS, databases and other publications and periodicals.
14. C.4. DIS Technical Assistance Services and Special Projects. Costs included in sections C.1. Through C.3. C.6., and C.8.
15. C.5. DIS Contract Technology Support. Costs included in sections C.1. Through C.3. C.6., and C.8. or provided by USAID.
16. C.6. DIS Consultant Services. Consultant costs should be budgeted for the following consultant work categories and number of days as follows for section C.6.

Development/Socio-Economic Res. Spec. -Senior	120 days
Development/Socio-Economic Res. Spec. -Mid-level	60 days
Management Support Specialists –Senior	20 days
Technical Support Specialists- Senior	20 days
Technical Support Specialists-Mid-level	20 days
Technical Support Specialists-Junior-level	20 days

Other Direct Costs (ODCs) should be estimated at \$20,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
17. C.7. DIS Contract Planning and Management. Costs included in sections C.1. Through C.3. C.6. and C.8.

18. C.8. DIS Contract and Facility Administration. Costs in this section shall include the DIS Contract Operations Manager, Computer Specialists and administrative and receptionist staff necessary for supporting the DIS contract administration, MIS management, contract reporting/filing and DIS contract facility operations. Other Direct Costs (ODCs) should be estimated at \$5,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, training supplies and miscellaneous costs. Additional proposed ODCs shall include (1) facility move and relocation costs to the proposed contractor off-site facility from the incumbent contractor facilities located at 1601 N. Kent Street, Rosslyn, VA and 1331 Pennsylvania Avenue, Washington, D.C., (2) the cost of the proposed Management Information System (MIS) commercial off-the-shelf (COTS) software purchase, maintenance and related training, and (3) the cost of operating the contractor's off-site facility for approximately 50 personnel.

The off-site facility costs should include line items for (1) office rent (including utilities, housekeeping, insurance etc.), (2) telephones, online Internet Service Provider and FNS/T-1 telecommunications costs, (3) courier service/postage costs, (4) reproduction equipment lease and operating costs, (5) facility and computer supplies, services and miscellaneous costs (6) facility space, office equipment, LAN and computer equipment build-out, maintenance and repair costs, and (7) LAN and computer workstation hardware/software replacements and upgrades for the facility and all proposed DIS contract staff in sections C.1. Through C.3. and C.8. (Estimate one complete replacement of LAN and computer hardware/software for off-site facility and all DIS contract staff over the five-year contract life cycle. Also periodic LAN server and applications software upgrades). The cost proposal shall maximize the use of the existing equipment list (computer, hardware, software and office furniture inventory) described in section J to lower proposal cost in this area.

19. C.9.1. Additional Core DIS Services Option. The contractor shall budget an additional 52,000 person hours per year and shall base the estimate on 2,080 person hours per year for each job category listed below with the exception of Senior and Mid-level Research Analysts which shall be estimated at 4,160 person hours per year each. The hourly rates will be the same rates proposed for these same job categories in sections C.1. Through C.3. and C.8. of the contract.

Job Category	Person Hours Per Year
Team Leader	2,080
Senior Research Analyst	4,160
Mid-level Research Analyst	4,160
Junior-level Research Analyst	2,080
Senior Social Science/Economic Analysts	2,080
Mid-level Social Science/Economic Anal.	2,080
Junior-level Social Science/Economic Anal.	2,080
Senior Librarians	2,080
Mid-level Librarians	2,080
Library Technicians	2,080
Senior Writer/Editors	2,080
Mid-level Writer/Editors	2,080
Senior Communications Specialists	2,080
Mid-level Communications Specialists	2,080
Senior Computer Specialists	2,080
Mid-level Computer Specialists	2,080
Senior Web Dev. Spec. /Webmasters	2,080
Mid-level Web Dev. Spec. /Webmasters	2,080
Senior Internet Development Advisor	2,080
Mid-level Internet Development Advisor	2,080
Senior Training Specialists	2,080
Mid-level Training Specialists	2,080
Administrative Assistant	2,080

In addition, the contractor shall budget an additional per person DIS Facility Support Cost, which is based on the same line items, used for computing the off-site facility cost in item 19 above (C.8. DIS Contract and Facility Administration), second paragraph. An additional line item should be added for new computer workstation and office furniture purchase required to serve this additional DIS contract staff need beyond available DIS contract computer equipment/office inventory. Other Direct Costs (ODCs) should also be estimated at \$215,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$50,000 per year for annual library acquisitions for purchase of books, journals, newspapers, references, CD-ROMS, databases and other periodicals.

The contractor shall also budget an additional 370 consultant days per year and shall base the estimate on the number of consultant days listed per year for each consultant category listed below. The daily rates will be the same rates proposed for these same job categories in sections C.6. of the contract. Other Direct Costs (ODCs) for this consultant support are included in the \$215,000 per year ODCs cited above for additional DIS contract staff support.

Consultant Category	Consultant Days per Year
Development/Socio-Economic Res.-Sr.	175 days
Development/Socio-Economic Res.-M.	50 days
Development/Socio-Economic Res.-Jr.	25 days
Management Support Specialist-Senior	30 days
Management Support Specialist-Mid	15 days
Management Support Specialist-Junior	15 days
Technical Support Specialist-Senior	30 days
Technical Support Specialist-Mid	15 days
Technical Support Specialist-Junior	15 days

20. C.9.2. Africa Global Information Infrastructure Project - Leland Initiative Option. Other Direct Costs (ODCs) should be estimated at \$205,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs. Additional ODCs shall include \$1,000 per year for annual library acquisitions purchase of books, journals, newspapers, references, CD-ROMS, databases and other periodicals and \$17,000 per year for consultant support.
21. C.9.3. PPC/PC Research Analyst Support. Other Direct Costs (ODCs) should be estimated at \$4,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
22. C.9.4. PPC/PDC Research Analyst Support. Other Direct Costs (ODCs) should be estimated at \$6,000 per year to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
23. C.9.5. LAC Hurricane Reconstruction Information Coordinator. Other Direct Costs (ODCs) should be estimated at \$8,000 for six months to include travel, temporary help, meeting expenses, courier service/postage, printing, supplies and miscellaneous costs.
24. C.10. Personnel Requirements. Costs included in sections C.1. Through C.3. C.6., C.8. and C.9.
25. C.11. Key Personnel. Costs included in sections C.1. Through C.3. and C.8.
26. C.12. Security. Security clearance costs paid through USAID agreement with Defense Security Service. DIS contract administration costs of DSS Security covered through section C.8.
27. C.13. Evaluation. Cost funded by USAID.

28. C.14. Technical Direction. Technical Direction Provided by USAID Cognizant Technical Officer (CTO).

L.4 (c) (1) CONTENTS OF PROPOSAL: The information requested below must be placed in a sealed envelope with the RFP number clearly marked on the outside of the envelope.

1. Written Management Approach/Institutional Capability Statement:
 - Original and four (4) copies
 - 40 page limit
2. Quality of Proposed Key and Other Senior Personnel (see section L.4. (c) (3) for list):
 - Original and four (4) copies
 - 60 page limit (4 page resume Key Personnel, 2 page resume Other Senior Personnel)
3. Past Performance References:
 - Original and four (4) copies
 - 10 page limit (2 pages for each reference)
4. Complete Certification Package (with supporting narrative for labor Matrices)
 - Original and four copies (4) copies.
5. Brochure Annex

L.4 (c) (2) MANAGEMENT APPROACH INSTITUTIONAL AND CAPABILITY INFORMATION:

An original and four (4) copies are required.

A. WRITTEN STATEMENT: The offeror is required to submit a written statement on its Management Approach and Institutional Capabilities in responding to the Statement of Work, found in section C of the solicitation. The statement shall not contain any pricing data, and shall be limited to forty (40) pages. The following subjects must be included, but not limited to the following.

(i) Corporate Capability and Experience: The offeror identifies and provides sufficient evidence of substantial and successful previous corporate experience in providing assistance to U.S. Government, international development organizations, and other developing country programs in the substantive areas of the statement of work, particularly in the (1) management of knowledge resources and information service operations, (2) provision of development research, statistical data analysis and library services, (3) implementation of knowledge sharing activities and (4) technical assistance to developing countries including knowledge/information management and services, statistical data services, training and user education in the information sciences, Internet applications and organizational learning for development..

(ii) Knowledge and understanding of relevant issues currently facing developing countries and regions and the roles, interventions and targets of opportunity which can be pursued by USAID as a “learning organization” and the DIS contract in improving Agency and development partner program effectiveness and development results.

(iii) Ability to collaborate successfully with other organizations in the Agency’s strategic development program areas. Demonstrate sustainable ties and networks within the U.S. and international community in these collaborative activities. Demonstrate the offeror’s ability to build and maintain relationships with host country counterparts, and to transfer information, technologies and skills.

(iv) Experience in managing complex information service projects and responding to different client groups with a diverse set of information needs.

(v) Rationale and efficiency of the proposed organizational management structure and systems as they relate to accomplishment, management, administration and reporting (including management information system approach) of the required work, to include clarity of lines of authority and service coordination for the contract.

B. BROCHURE ANNEX

- (i) Ability to efficiently and effectively assemble highly qualified technical assistance teams, place them in the field in a timely manner and provide them with all necessary support, including subcontractors.
- (ii) Offeror may include limited additional attachments/brochures that may provide additional support to the statement of work. Any additional attachments shall not be prepared solely for the purposes of the proposal, but must be pre-existing and available to the general public. Examples of acceptable attachments include pamphlets, copies of evaluations that were completed by the offeror, annual reports and other promotional material. Additional attachments/brochures shall be placed in the offeror after the written statement as an annex.

C. ORAL PRESENTATIONS: After the submission of offers and review of written capability information, every offeror still under consideration for award may be required to make an oral presentation to USAID's technical evaluation committee to further support institutional capabilities. The Contracting Officer will determine whether oral presentations are necessary and shall notify offerors who will be required to make an oral presentation. The following guidelines and procedures shall be followed by offerors required to make an oral presentation:

(i.) Presentations must be made in person. Accordingly, the submission of videotapes or other forms of media will not be accepted.

(ii.) **If oral presentations are held, then** the oral presentation shall be considered part of the Institutional Capability evaluation, the sole purpose of which is to enable the evaluation board to clarify each offeror's ability to perform the required work. The offeror must demonstrate, through a presentation and question and answer session, its understanding of the Government's requirements; familiarity with the types of problems that may develop during performance; and its ability to develop practicable and effective solutions to those problems.

(iii.) The Contracting Officer will schedule the oral presentations and notify the offeror of the scheduled date, time, and location of its presentation within forty-five (45) days of receipt of offers. It is anticipated that oral presentations will commence approximately forty-five (45) days after the RFP's closing date. The order in which offerors will make their presentations will be determined by a random drawing by the Contracting Officer after receipt of proposals. Once notified of the scheduled presentation date and time, offerors must make their oral presentations in accordance with these instructions and any additional instructions that the Contracting Officer may provide. Oral presentations are not subject to the rules for the late submission of proposals in FAR 15.208 and FAR 52.215-1. USAID understands the need to be flexible in scheduling oral presentations. However, given the logistical challenges in scheduling the oral presentations, unless the offeror provides advance notice to the Contracting Officer indicating a compelling rationale to reschedule the oral presentation, requests to reschedule the assigned presentation date and time will not be considered and no rescheduling of presentations will be done. Requests to reschedule are subject to the sole approval of the Contracting Officer. Should the Contracting Officer decide that a rescheduling of oral presentations is required to resolve unanticipated problems or delays in the presentation process, offerors will be so advised.

(iv.) **Participation and Attendance:** Only members of the offeror's or subcontractor's in-house staff may participate in the presentation. The only exception is an individual who is proposed to perform under the Contract in a key personnel role in performance category in section L.4 (c) (3) but who is not currently employed by the Offeror/ Subcontractor. Offerors are required to have representative senior-level personnel of its own staff participate in the presentation. The offeror may not use a professional speaker or consultant to make its presentation. The offeror may send no more than three (3) representatives to the oral presentation. Consultants to the offeror may not attend the presentation.

[Note: Should a single firm be proposed as a subcontractor under multiple offers, that firm is precluded from participation in any oral presentation made under this RFP. Should a single firm submit a proposal as a prime offeror and also be included under another proposal as a subcontractor, that firm shall only be permitted to participate in the oral presentation for its prime offer.]

(v.) **Presentation Agenda.** Total estimated length of oral presentations is 60 minutes. The offeror must arrive promptly on its scheduled presentation date and time.

(a.) *Segment I:* At the scheduled time, the offeror shall provide a 30 minute presentation demonstrating background on its organization as well as capabilities and management approaches relevant to the subject area for which they are offering. The offeror shall demonstrate its qualifications, approach and understanding of the subject area scope of work and the organization and procedures by which it proposes to perform under the contract. If an offeror arrives late, the time will be counted against the time allowed for its oral presentation. During the presentation, the evaluation board will not interrupt the offeror, other than to request the repetition of inaudible words or statements or the explanation of unfamiliar terms.

(b.) At the conclusion of the presentation, a short break will be provided.

(c.) *Segment II:* After completion of Segment I, an estimated 30-minute question and answer session shall take place. Members of the evaluation team will ask questions regarding information provided in the written capability statement as well as information presented orally in Segment I above or other questions they may have about the offeror, its qualifications or plans for performance.

(d.) The Contracting Officer will tell the Offeror when to start its presentation, keep time, and stop the presentation at the end of the allotted time period.

(e.) No price information shall be included in the oral presentation.

(vi.) **Discussions.** The oral presentation and the question and answer session, if conducted, are intended to supplement the offeror's Institutional Capability Statement as provided. Therefore, neither the oral presentation nor the question and answer session will constitute discussions, as that term is defined and used in FAR subpart 15.306. If at any time (e.g., prior to the oral presentation, during the oral presentation, or post presentation), the Government intends to enter into discussions, offerors will be so advised.

(vii.) **Facility:** Government facilities will be provided for the oral presentations. These presentations will take place in USAID office space to be designated at a later date. A conference room will be provided for the presentation.

(viii) **Presentation Media and Materials:** The Government will provide a blank pad of flip chart paper, overhead projector and marker pens for the offeror's use in its presentation. The handouts during the oral presentations shall be limited to a copy of the transparencies.

(ix.) List of Presentation Participants: Offerors shall submit an original and four (4) copies of the following:

(a.) A list of the individuals that will represent the offeror at the presentation. The list shall include each representative's name, title, firm, and length of employment with that firm.

(b.) The Government will process the list of presentation participants received after the deadline in accordance with FAR 15.208 and FAR 52.215-1. If the list is late and is not accepted for consideration on the basis of FAR 15.208 and FAR 52.215-1, then the Government will consider the offeror to be ineligible for award and will not permit that offeror to make an oral presentation and will reject its offer without further evaluation.

L.4 (c) (3) QUALITY OF PROPOSED PERSONNEL: The offeror shall submit the resumes for key areas. *An original and four (4) copies are required.*

The following positions are designated key personnel:

Project Director
USAID Library Manager/Knowledge Resources Team Leader
Development Research Service Team Leader
Development Statistics Service Team Leader
Knowledge Sharing Team Leader
DIS Contract Operations Manager

The following positions are designated Other Senior Personnel in Sections C.1. to C.3.

Senior Research Analysts (10 staff, including G/DG Center Information Unit Senior Research Analyst/Program Manager)
Senior Social Science/Economic Analysts (5 staff)
Senior Librarian Learning Resources Center
Africa Bureau Information Center Senior Manager/Editor
ANE Senior Internet for Development Advisor

The resumes for key personnel shall not contain any pricing data, and shall be limited to four (4) pages for each proposed person. The resume for other senior personnel in sections C.1. to C.3. as specified above shall not contain any pricing data, and shall be limited to two (2) pages for each proposed person. The total amount of pages for the key personnel listed above shall be 60 pages. The following subjects must be included, but not limited to the following.

(i) Education: Demonstrate the proposed personnel possess education and years of work experience as stated in section C in order to adequately perform the requirements of the Contract.

(ii) Technical Experience: Demonstrates strong past experience primarily in development research, socio-economic data analysis, library and information science, development communication, user education and training, Internet and related information technology skills to meet the technical requirements in Section C.

(iii) Development Knowledge: Work experience demonstrates understanding and knowledge of economic and social development and humanitarian assistance issues, in one or more Agency goal areas as required in section C.

(iv) Managerial/Supervisory Experience [Key Personnel and Manager Positions Only]: Demonstrate managerial and supervisory experience commensurate with the level of the positions being proposed and the scope of the information service operations described in section C.

L.4 (c) (4) PAST PERFORMANCE REFERENCES

An original and four (4) copies are required. The offeror is required to provide past performance references for both itself and for each proposed subcontractor expected to provide at least 20% of the total labor in performance of any contract made under this RFP. This past performance information shall be limited to ten (10) pages (2 pages per reference) and shall be submitted in accordance with the following:

(A) For the Offeror and each proposed subcontractor expected to provide at least 20% of the total labor per the above, list no more than five (5) past or current contracts for efforts similar to this requirement in relation to size, scope, and complexity and subject matter. The list shall include for each referenced contract: (1.) the name of the organization, (2.) the project name, (3.) a brief project description, (4.) the period of performance, (5.) the contract amount, and (6.) the name and telephone number of at least two contacts at the organization for which the service was performed (not the Offeror). It is recommended that the Offeror alert the contacts that their names have been submitted and that they are authorized to provide past performance information when requested.

- Description of Systemic Improvement - evidence of continuing effort to identify problems and resolve them, thereby improving performance; description should include how such problems were fixed;
- Demonstration of commitment to customer satisfaction;
- Successful financial performance and cost control;
- Business integrity, honesty, and fair dealing;
- Compliance with contract terms and conditions, including the technical, business, and administrative aspects of performance; and overall contract management. This includes, as required by FAR 15.305-(a) (2) (v), compliance with subcontracting goals for small disadvantaged business concerns, monetary targets for SDB participation, and notifications submitted under FAR 19.1202-4 (b).
- Past Performance includes both U.S. Government and non-U.S. Government work, on both corporate (organizational) and individual levels.

(D) USAID may use past performance information obtained from other than the sources identified by the Offeror/subcontractor. USAID shall determine the relevance of similar past performance information. Past performance, information will be used for both the responsibility determination and best value decision.

L.4 (c) (5) CERTIFICATION PACKAGE:

An original and four (4) copies of each of the following are required:

- (A) RFP Page 1-- Standard Form (SF) 33, "Solicitation, Offer, and Award"-- Offeror must complete blocks 12 through 18;
- (B) Solicitation Provisions and Contract Clauses requiring offer completion (offeror fill-ins)
- (C) Attachment 3 – Form 1420-17 Contractor Employee Biographical Data Sheet
- (D) Attachment 4 - SFLLL - Disclosure of Lobbying Activities
- (D) Attachment 5 – Total Offer/Ceiling Price Worksheet (Specific written information regarding proposed prices. All offered prices shall be rounded to the nearest whole dollar.)

(F) Attachment 6 – Model Small/Small Disadvantaged/Women-Owned Small Business Subcontracting Plan

(G) Attachment 7 – Certification of Current Cost or Pricing Data.

(H) Attachment - Labor Matrix with Narrative: A excel spreadsheet is provided for each offeror to use for the cost proposal see RFP COST PROPOSAL.XLS

The Offeror shall submit specific information supporting components of proposed offered in Section of the Statement of Work in this solicitation, calculate Total Labor, and provide a detailed narrative explaining cost components of offered.

(i.) Maximum Base Hourly Rate: No unburdened base hourly labor rates may exceed the current maximum hourly salary for an ES-6 of \$58.85/hour. The total number of billable work hours in a year, which should be no more than 2080, may not lead to an annual salary exceeding the ES-6 annual salary of \$122,400.

L.5 SMALL, SMALL DISADVANTAGED AND WOMEN-OWNED SMALL BUSINESS SUBCONTRACTING PLAN

Offerors other than small businesses are required to submit a Small, Small Disadvantage and Women-Owned Small Business Subcontracting Plan (See Attachment 7). Subcontracting plans must address subcontracting with small, small disadvantaged and women-owned small businesses and should include a goal of at least 15 % of the total contract value with these concerns.

L.6 52.219-24 - SMALL DISADVANTAGED BUSINESS PARTICIPATION PROGRAM-- TARGETS (JAN 1999)

(a) This solicitation contains a source selection factor or sub-factor related to the participation of small disadvantaged business (SDB) concerns in the contract. Credit under that evaluation factor or sub-factor is not available to an SDB concern that qualifies for a price evaluation adjustment under the clause at FAR 52.219-23, Notice of Price Evaluation Adjustment for Small Disadvantaged Business Concerns, unless the SDB concern specifically waives the price evaluation adjustment.

(b) In order to receive credit under the source selection factor or sub-factor, the Offeror must provide, with its offer, targets, expressed as dollars and percentages of total contract value, for SDB participation in any of the Standard Industrial Classification (SIC) Major Groups as determined by the Department of Commerce. The targets may provide for participation by a prime contractor, joint venture partner, teaming arrangement member, or subcontractor; however, the targets for subcontractors must be listed separately.

L.7 52.233-2 SERVICE OF PROTEST (AUG 1996)

(a) Protests, as defined in Section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the General Accounting Office (GAO), shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from:

Mr. Michael B. Gushue, Contracting Officer
U.S. Agency for International Development
M/OP/B/AEP
Washington, D.C. 20523-7100

(b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

L.8 EEO COMPLIANCE REVIEW (OCT 1997)

If the award, when let, should total \$10 million or more, the prospective contractor and its known first-tier subcontractors with subcontracts of \$10 million or more shall be subject to a compliance evaluation before the award of the contract unless OFCCP has conducted an evaluation and found them to be in compliance with Executive Order 11246 within the preceding 24 months.

L.9 GENERAL INSTRUCTIONS TO OFFERORS

(a) The offeror should submit one original and Four (4) copies of a technical proposal and one original and four (4) copies of a cost proposal. The Technical Proposal and Cost Proposal must be kept separate from each other. Technical Proposals must not make reference to pricing data in order that the technical evaluation may be made strictly on the basis of technical merit.

(b) Submission of Alternate Proposals

All offerors shall submit a proposal directly responsive to the terms and conditions of this RFP. If an offeror chooses to submit an alternative proposal, they must, at the same time, submit a proposal directly responsive hereto for any alternate to even be considered.

(c) Government Obligation

The US Government is not obligated to make an award or to pay for any costs incurred by the offeror in preparation of a proposal in response hereto.

[End of Provision]

L.10 INSTRUCTIONS FOR THE PREPARATION OF THE TECHNICAL PROPOSAL

(a) The Technical Proposal in response to this solicitation should address how the offeror intends to carry out the Statement of Work contained in Section C. It should also contain a clear understanding of the work to be undertaken and the responsibilities of all parties involved. The technical proposal should be organized by the technical evaluation criteria listed in Section M.

(b) The past performance references required by this section shall be included as an annex or attachment of the technical proposal.

(c) The technical proposal should, at a minimum, include the items in L.4 (c) (1).

[End of Provision]

L.11 INSTRUCTIONS REGARDING KEY PERSONNEL

The contract proposed by this solicitation includes a key personnel clause, and the quality of key personnel proposed will be an evaluation factor. The offeror must include as part of its proposal a statement signed by each person proposed as key personnel and other Senior Personnel specified in section L. 4 (c) (3) confirming their present intention to serve in the stated position and their present availability to serve for the term of the proposed contract.

[End of Provision]

L.12 INSTRUCTIONS FOR THE PREPARATION OF THE COST PROPOSAL

- (a) Each offeror shall provide a budget for each line item listed in Section B. Supporting information should be provided in sufficient detail to allow a complete analysis of each line item cost. This is to include a complete breakdown of the cost elements associated with each line item and those cost associated with any proposed subcontract.
- (b) If the contractor is a joint venture or partnership, the business management proposal must include a copy of the agreement between the parties to the joint venture/partnership. The agreement will include a full discussion of the relationship between the firms including identification of the firm which will have responsibility for negotiation of the contract, which firm will have accounting responsibility, how work will be allocated, overhead calculated, and profit shared, and the express agreement of the principals thereto to be held jointly and severally liable for the acts or omissions of the other.
- (c) Detail of the offeror's management structure as it relates to performance of services described in Section C.
- (d) The representations and certifications, as set forth in Section K of this solicitation, with the last page signed. This should be completed by subcontractors as well.
- (e) A completed Certificate of Current Cost or Pricing Data (see Section J of this solicitation) for itself and each subcontractor, if the subcontract will exceed \$500,000. (This certificate should be re-submitted after negotiations have been concluded and agreement has been reached.)
- (f) Audited balance sheets and profit and loss statements or if not available, returns as submitted to Federal tax authorities for the offeror's last two complete fiscal years and for the current fiscal year as of 30 days prior to proposal submission. (The balance sheets and profit and loss statements for the current fiscal year may be unaudited.) The profit and loss statements should include details of the total cost of services sold, and be annotated by either the auditor or offeror to delineate the offeror's indirect expense pool(s) and customary indirect cost distribution base(s).
- (g) A copy of the offeror's personnel policies in effect at the time the offer is submitted.
- (h) A copy of the offeror's travel policies in effect at the time the offer is submitted.

[End of Provision]

L.13 EEO COMPLIANCE REVIEW (OCT 1997)

If the award, when let, should total \$10 million or more, the prospective contractor and its known first-tier subcontractors with subcontracts of \$10 million or more shall be subject to a compliance evaluation before the award of the contract unless OFCCP has conducted an evaluation and found them to be in compliance with Executive Order 11246 within the preceding 24 months.

L.14 52.216-1 TYPE OF CONTRACT (APR 1984)

The Government contemplates award of a cost-plus-fixed-fee, term contract resulting from this solicitation.

[End of Provision]

L.15 52.233-2 SERVICE OF PROTEST (AUG 1996)

(a) Protests, as defined in Section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the General Accounting Office (GAO), shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from:

Mr. Michael B. Gushue, Contracting Officer
 U.S. Agency for International Development
 M/OP/B/AEP
 Washington, D.C. 20523-7100

- (b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

[END OF SECTION L]

SECTION M - EVALUATION FACTORS FOR AWARD**M.1 52.252-1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)**

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this/these address (es):

<http://www.arnet.gov/far>
<http://www.info.usaid.gov>

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) PROVISIONS

NUMBER	TITLE	DATE
52.217-5	EVALUATION OF OPTIONS	JUL 1990

M.2 GENERAL

M.1 (a) (1) USAID intends to award one contract, if only one acceptable offer is received, then only one contract will be awarded. Accordingly, submitted offers must demonstrate the Relative Capability to perform the entire quantity entailed by the Offeror's acceptance.

M.1 (b) USAID will award the contract to the Offeror who represent the best value to the Government on the basis of (1) price, (2) its relative capability, and (3) small business subcontracting participation (section M.4) as explained below.

M.3 PRICE

M.2 (a) PRICE - USAID will evaluate the proposed price in accordance with FAR Subpart 15.4, Section M.6 below, and as indicated in the cost evaluation matrices described in Section J attachment nine (9) and Section L.4 (C) of the solicitation. For the purpose of the evaluation the estimated price of the contract is considered to be the total sum of all USN Fixed hourly labor rates multiplied by the estimated hours for each rate, determined by the rate listed in Section B.5 (d), plus the Small Disadvantaged Business evaluation factor (10%), if applicable (See Section I.6).

M.4 RELATIVE CAPABILITY

M.4 (a) Management approach and institutional Capability

1. USAID will evaluate the Offeror's demonstrated Management Approach and Institutional Capability based upon the following factors:

- **Corporate Capability and Experience:** The offeror identifies and provides sufficient evidence of substantial and successful previous corporate experience in providing assistance to U.S. Government, international development organizations, and other developing country programs in the substantive areas of the statement of work, particularly in the (1) management of knowledge resources and information service operations, (2) provision of development research, statistical data analysis and library services, (3) implementation of knowledge sharing activities and (4) technical assistance to developing countries including knowledge/information management and services, statistical data services, training and user education in the information sciences, Internet applications and organizational learning for development.
- **Knowledge and understanding of relevant issues currently facing developing countries and regions and the roles, interventions and targets of opportunity which can be pursued by USAID as a “learning organization” and the DIS contract in improving Agency and development partner program effectiveness and development results.**
- **Ability to collaborate successfully with other organizations in the Agency’s strategic development program areas.** Demonstrate sustainable ties and networks within the U.S. and international community in these collaborative activities. Demonstrate the offeror’s ability to build and maintain relationships with host country counterparts, and to transfer information, technologies and skills.
- **Experience in managing complex information service projects and responding to different client groups with a diverse set of information needs.**
- **Rationale and efficiency of the proposed organizational management structure and systems as they relate to accomplishment, management, administration and reporting (including management information system approach) of the required work, to include clarity of lines of authority and service coordination for the contract.**
- **Ability to efficiently and effectively assemble highly qualified technical assistance teams, place them in the field in a timely manner and provide them with all necessary support, including subcontractors.**

2. Offerors may be required to give oral presentations (see section L.4, subsection [C] [2] [B]). Oral presentations augment the aforementioned Management Approach and Institutional Capability factors. The oral presentation and question and answer sessions are not separate evaluation criteria, but are used to clarify USAID's understanding of the Offeror's Capability.

M.4 (b) KEY PERSONNEL AND OTHER SENIOR PERSONNEL- USAID will evaluate the quality of personnel (see Section L.4 [c] [3] proposed as it relates to the Offeror's capability and the personnel requirements stated in section C. The evaluation will be based on the relevant qualifications of the Offeror's key personnel and other senior personnel as demonstrated by their formal education and its relevancy and the relevance and relative depth and breadth of their technical and managerial experience and development knowledge; and on their reputation for integrity, competence, cooperativeness, and effectiveness.

M.4 (c) PAST PERFORMANCE - USAID will evaluate each Offeror's past performance (as well as the past performance of each proposed subcontractor expected to provide at least 20% of the total labor in performance of any contract awarded under this RFP) on the basis of its reputation for integrity, competence, commitment, systematic improvement and compliance with contract terms and conditions with its former and current customers. Past Performance includes both U.S. Government and non-U.S. Government work, on both corporate (organizational) and individual levels.

M.5 CONTRACTING WITH SMALL BUSINESS CONCERNS AND DISADVANTAGED ENTERPRISES

(A) Offerors other than small businesses are required to submit subcontracting plans (See Attachment J.7). Subcontracting plans must address subcontracting with small business concerns, small disadvantaged business concerns and women-owned small business concerns. The plans must include a percentage goal of at least 15% of the total contract value with small business concerns, small disadvantaged business concerns and women-owned small business concerns. Offerors who are required to submit a subcontracting plan but fail to do so shall be ineligible for award.

(b) All offerors (including small businesses) are required to provide a participation target for small disadvantaged businesses. This target will be a part of the sub-contracting plan discussed in M.4 (a) above, but is an a separate and distinct requirement. Reference FAR provision 52-219-24 in Section L and Section H.9 of this solicitation. Offerors who do not provide a small disadvantaged business target shall be ineligible for award.

(c) USAID encourages the participation of small business concerns and disadvantaged enterprises in this project, in accordance with FAR Part 19 (48 CFR Chapter 1) and AIDAR Part 726 (49 CFR Chapter 7). Accordingly, every reasonable effort will be made to identify and make use of such organizations. All evaluation criteria being found equal, the participation of such organizations may become a determining factor for selection.

M.6 RELATIVE IMPORTANCE OF THE EVALUATION FACTORS

M.5 (a) All evaluation factors other than price, when combined, are significantly more important than price.

M.5 (b) The various evaluation factors are listed as follows in order of descending relative importance:

Management Approach and Institutional Capability
Key Personnel
Past Performance
Price
Small Business Subcontracting Participation/SDB target

M.5 (c) The relative impact that any of the factors or sub factors will have on the source selection decision will depend on the differences among the competing Offers.

M.7 CONTRACT AWARD/BEST VALUE APPROACH

This solicitation shall use a best value approach. In order to select the winning Offer(s), USAID will rank the competing Offers that are under consideration for award, making a series of comparisons among the offers, trading off the differences in the non-price factors against the difference in price between as follows:

- a. If one Offer is better in terms of the non-price factors and has the lower evaluated price, then USAID will consider that Offer to be the better value.
- b. If one Offer is better in terms of the non-price factors but has the higher evaluated price, then USAID will decide whether the differences in the non-price factors are worth the difference in evaluated price. If USAID considers the differences in the non-price factors to be worth the difference in evaluated price, then USAID will consider the Offer with the higher evaluated price to be the better value. If not, USAID will consider the Offer with the lower evaluated price to be the better value.
- c. USAID will continue to make paired comparisons in this way until it has been determined which offer(s) represent the best value.

[End of Provision]

M.8 DETERMINATION OF THE COMPETITIVE RANGE AND CONTRACT AWARD

(a) The competitive range of offerors with whom negotiation will be conducted (if necessary) will be determined by the Contracting Officer based on the above technical and cost evaluation factors, and will be comprised of all offerors whose proposals are determined to have a reasonable chance of being selected for award.

(b) In accordance with FAR 52.215-16, and as set forth in Section L of this solicitation, award will be made by the Contracting Officer to the responsible offeror whose proposal, conforming to the solicitation, is most advantageous to the Government, and the above technical and cost factors considered. The formula set forth above will be used by the Contracting Officer, as a guide in determining which proposals will be most advantageous to the Government.

[End of Provision]

M.9 COST REALISM

Cost realism will be performed as part of the evaluation process. The purpose of this evaluation is (1) to verify the offeror's understanding of the requirements; (2) to assess the degree of risk that the offerors will provide the supplies, services and key personnel for the proposed price and cost. Proposed costs may be adjusted for the purposes of evaluation based on the results of the cost realism evaluation. When this adjustment is performed, the resulting realistic estimate of cost shall be used in the evaluation of the offeror's cost.

[End of Provision]

[END OF SECTION M]